

VIDEO AGE

international

In This Issue:

- NATPE's Pulse
- TLN's 25th Year
- Latin TV Directory
- Brazilian TV Drama

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Ups And Downs as Recorded Through The Years by VideoAge

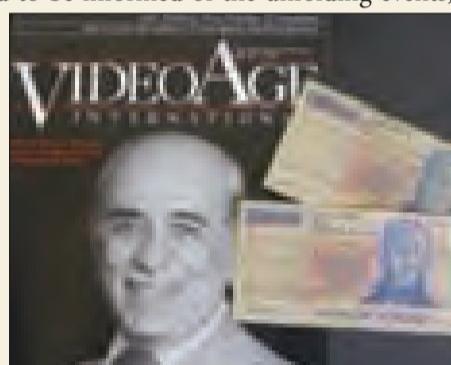
By DOM SERAFINI

The world over has witnessed an America that, in 2001 began the first of George W. Bush's two presidential terms with the tragic destruction of parts of Wall Street, and ended in 2008 with a dramatic Wall Street crisis. In both cases the entire planet paid the consequences in human lives and suffering. And in both cases the television industry was catapulted into the driver's seat by the public's need to be informed of the unfolding events, as well as to have its worries relieved through entertainment.

It is a truism that in times of crisis, the television sector around the world prospers. It's not something new — the ancient Romans used to demand *panem et circenses*, or "just bread and entertainment," from their leaders.

In modern times, *The New York Times* stated it best. It recently wrote: "Historically, the movie factories haven't been afraid of tough economic times. In fact, they have

(Continued on Page 38)



In 1981-82 one million Argentinean pesos bought one bottle of soda

Net Neutrality: MPAA vs. IFTA

Last November's American Film Market (AFM) was abuzz with the news that freshly-minted President-elect Barack Obama had come out in favor of net neutrality (i.e. unregulated Internet) in the U.S. Jean Prewitt, CEO of the Independent Film and TV Alliance (IFTA), which organizes the AFM, capitalized on Obama's position on Internet neutrality in her opening day remarks, noting that her organization viewed it as favorable.

Conversely, earlier in the year, U.S. studio lobbying arm, the Washington D.C.-based Motion Picture Association of America (MPAA), had come down against net neutrality. MPAA CEO Dan Glickman announced his organization's perspective in a speech last year when he said, "We are opposing so-called 'net neutrality' government action. And, in the process, we are standing up for our customers, for our economy and for the ability of content producers to continue

(Continued on Page 44)

NATPE Buyers Buoyant 'Bout Biz, But Bearish

By ERIN SOMERS

For the past few weeks, distribution companies that will be exhibiting at NATPE have been holding their breath in anticipation of how the worldwide financial crisis will affect business at the Las Vegas market. For the past three months, many international content providers have faced dried-up acquisitions budgets, and now they're anxiously awaiting NATPE, the first market of the year, to confront the new paradigm. Especially stressful to sellers is the prospect that buyers' budgets will be slashed after

TV outlets the world over have cut local productions. With this fear in mind, *VideoAge* spoke to a host of international Acquisitions execs who will grace the convention floor of the Mandalay Bay

(Continued on Page 8)

Africa Prepares For Television. DISCOP Prepares For Africa

By DAVID SHORT

Avery well financed European businessman recently landed in an African country with a mission to launch a TV station featuring highly innovative content. His first stop was not a bank where he could seek money or a management consultancy where he could ask for advice. Instead, it

(Continued on Page 42)

crash

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CONTENTS

VIDEO AGE • NO. 1 • January 2009

Cover stories:

Ups and downs as recorded through the years by VideoAge. The crisis that unfolds is always the most difficult, but history says otherwise

Buying is an inevitable activity at NATPE, but it's important to know the four Qs: quantity, quality, how quick it is needed and the kind of *quid pro quo*

Africa prepares for television. DISCOP prepares for Africa. Are international producers and distributors prepared for any of it?

Net Neutrality is not a neutral subject, especially when so much is at stake

2.

World: Remembering VideoAge's Janet Fine, Canada, France, India, U.K. Plus: Famous Quotes

6.

Book Review: Hugh Hefner as the bunnyman. T&A are his T&E



10.

NATPE confronts a shaky economy, suite vs. floor exhibition, Latins' demands and a tough future



14.

Predictions for 2009 are easy when going negative. So expect chaos under stress for content providers

16.

Singapore as a huge shopping center was inspiring to Asia TV Forum's market participants

20.

No more tears. Nowadays Brazilian television brings fear to viewers and dollars to producers



22.

Salute to TLN's 25th anniversary. Canada's first trilingual TV network uses dollars as the common denominator

26.

Latin America TV Distribution directory. If it's at NATPE, it's in there!

29.

Sección en Español:

La investigación y desarrollo en televisión se llama "Piloto"

Ex ejecutivos encuentran verdadero trabajo como consultores

La TV Americana va más allá de sus fronteras

36.

Israeli television: When the pond is too small for fish that want to grow

46.

Conferences & Events News. It's more than just dates

48.

My2¢. Check it out. This time the editor could be making sense. It's about making movies work for television



Canada's Nets Not Coined By Cable

Canada's biggest broadcast TV networks may be forced to reexamine the way they do business after federal regulators at the Canadian Radio-television and Telecommunications Commission (CRTC) rejected a proposal that would allow the networks to collect millions in new fees.

Led by CTV and CanWest's Global Television, the broadcast networks had proposed charging cable and satellite carriers for their TV signals, a move valued at C\$300 million to the broadcasters. CRTC's decision to dismiss the request now leaves the networks with some tough decisions to make during rough economic times.

The fees would have been worth approximately C\$75 million in annual revenue for Global TV, a large amount, especially considering that many

networks have already begun to see their profit margins shrink.

CTV is privately owned and CanWest is publicly traded. CanWest officials have gone on record as saying that they are not yet looking at layoffs, but noted that Canada's big TV nets are going to have to rethink their business models.

In making their ill-fated proposal, the networks had argued that they shouldn't be forced to give their signals for free to distributors, who then offer them as part of their subscriber packages and make millions in the process. CRTC representatives said that the networks simply didn't make a convincing enough argument that they really needed the money.

Despite CRTC's dismissal of the offer, the regulator did make one concession to the networks, allowing them to negotiate with cable carriers to charge for carrying "distant signals." That could be worth

up to C\$93 million a year for the broadcast TV sector at large.

France's Public TV Ads Cut

France's National Assembly has approved a plan to remove advertising from public television.

The initiative, spearheaded by President Nicolas Sarkozy, was enacted on all four of the nation's public channels early this year. Additionally, the new plan will allow Sarkozy to select the chief of the French public broadcasting company, France Télévisions.

According to Sarkozy, the goal of the plan is to restore quality programming to public networks whose content has suffered due to competition for ads with the private sector. However, opponents of the initiative have said that it will invite abuses from the president, particularly when it comes time to campaign for his 2012 reelection.

On January 5, networks gradually began to remove advertising, starting with primetime and overnight programming. To make up for the funding lost by eliminating ad revenue, two new taxes — a 0.9 percent tax on the revenue of Internet service and telephone providers, and an added 1.5 percent tax on the ad revenues of private TV channels — will be imposed. Although Sarkozy is meeting with widespread criticism from politicians and members of the media, there is a long historical precedent of presidents reorganizing the structure of France's public TV system.

Remembering Janet Fine

It's been a year since the untimely passing of longtime *VideoAge* contributor Janet Fine. To commemorate this tragic milestone, we take a look back at the life and times of the versatile writer, sister and aunt.

An expert in TV, film and media in the Middle East and India, Fine was the former *Hollywood Reporter* Indian bureau chief and contributing editor for Egypt's *Transnational Broadcast Studies*, as well as a Dubai-based correspondent for *Millionaire Magazine*. In addition, Fine covered the Middle East region for *Variety* and served as editor of the Cairo-based Starwood International Group Sheraton Hotel Magazine *Sojourn*. A prolific writer, Fine also penned five books with her own Mumbai, India-based publishing company. And of course, she made invaluable contributions to *VideoAge* as our own Middle Eastern correspondent for many years.

But she wasn't all about work. Fine was also an accomplished classical Indian dancer, a patron of the arts, and an all

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(Continued on Page 4)

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World

(Continued from Page 2)

around good person who was described by her sister Carla as one who "supported people whose lives were defined by poverty" and "fed stray dogs and cats in every city she visited."

When she wasn't traveling from India to Egypt covering media news there and in the many countries in between, she would head back to her New York City base or travel to Florida to visit relatives.

Fine died in Bombay in November 2007 following a long illness that only a



few people were even aware of. She is survived by her sisters, Carla, Ellen and Jill; and her nephews Ben and Jono.

Mumbai Attacks Tie Up Media

Coverage of a hostage situation in Mumbai by local news outlets has prompted new media regulations in India. Last November, armed terrorists attacked the nation's financial capital, killing more than 125 people and taking hostages at two luxury hotels and the Chabad House (a Jewish outreach center). Over the course of the three-day occupation, TV reporters swarmed the site, interviewing hostages by phone and even speaking to some of the gunmen.

In the aftermath of the crisis, members of the media were strongly criticized by the government, who said their aggressive tactics hampered national security and endangered lives. Additionally, news stations drew

government disapproval over images of the famous Taj Hotel engulfed in flames as well as footage of the dead, which were replayed over and over and eventually rebroadcast internationally.

In response to this government outcry, the country's leading broadcasters have banded together to enact a set of self-regulatory guidelines. The new rules include a pledge not to report hostage situations or conduct interviews with victims or attackers while an event is taking place. They have also promised to exercise caution when airing footage of dead or wounded. The new regulations have been described by media professionals as an attempt to pre-empt government censorship on the news.

Behavioral Ads Debated in U.K.

Internet advertising, and behavioral targeting in particular, has been a topic of recent dispute in the U.K. Last month, David Heath, member of Parliament and leader of the Liberal Democrats' Commission on Privacy, led a debate in the House of Commons about whether or not online advertising compromises privacy. In addition to the MPs, representatives from behavioral targeting companies and execs from Internet advertising heavyweights, including Yahoo and Google, took part in the discussion. In the end, the group voted that Web ads do not compromise consumer privacy.

Also in December, research institute New Media Knowledge convened a similar assembly of behavioral analysts and advertising researchers to debate the same issue. Titled "The Fire and The Fury," the panel was made up of reps from Phorm and Specific Media, firms that specialize in advertising targeting, as well as a research fellow and privacy advocate from the Oxford Internet Institute.

Throughout the event, Phorm Commercial director Nick Barnett was bombarded with questions regarding legal and ethical aspects of his company's technology, which targets Web users based on what sites they go to. Though Barnett maintained that the company's technology is perfectly legal, Ian Brown of the Oxford Internet Institute argued the illegality of the personal information of consumers being passed on to Internet service providers without their consent. Thus far no official legislation has been passed on the issue.

Famous Quotes

"How did we get here?"

—U.S. President George W. Bush showing his aloofness at a Sept. 18, 2008 emergency meeting on the imminent economic meltdown as reported in *The New York Times*, Dec. 21, 2008.

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The Man Behind the Bunnies: Dissecting Hugh Hefner

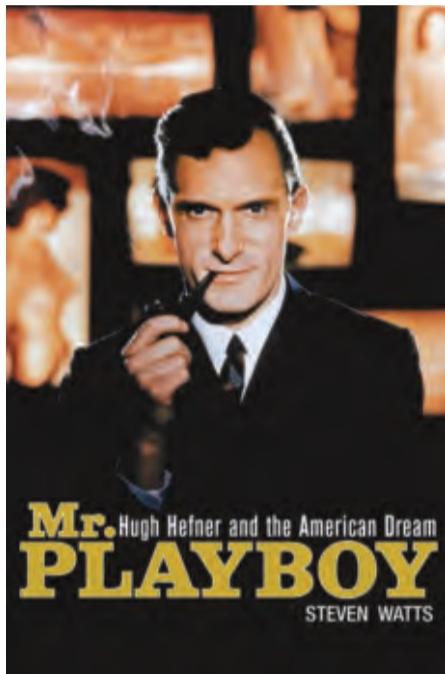
To get a glimpse into the luxurious life of media mogul and notorious womanizer Hugh Hefner, one only has to turn on E!, the cable entertainment channel. Here, amidst the grottos of the Playboy Mansion, he can be seen doddering around benignly with his three young live-in girlfriends for a reality show called *The Girls Next Door*. As far as reality programming is concerned, the show is fairly innocent: octogenarian Hef is shown attending classic movie nights with the girls, having tame holiday celebrations and heading to bed early.

The effect is a far cry from the Hefner of a few decades ago, who had a reputation for being a hard-partying swinger. Yet it is also to Hefner's credit that the show, which portrays a polygamous living situation as normal, healthy, and enjoyable for all involved, is even on the air. Were it not for Hefner's 50-plus years of working to change perceptions of sex in the media, no such openly sexual programming would ever grace the airwaves.

In a new biography, **Mr. Playboy: Hugh Hefner and the American Dream** (2008, John Wiley & Sons, 529 pages, U.S.\$29.95), author Steven Watts takes an in-depth look at the man behind *Playboy* magazine and numerous other Playboy Media endeavors that helped to reshape the world's perception of sex. Though the topic would seem to lend itself to a light, frivolous approach, Watts, a professor of the cultural history of the U.S., takes on Hef's life story with a sense of gravitas befitting George Washington, and succeeds in painting a picture of a greatly ambitious, deeply flawed man who could easily be termed a marketing genius.

Throughout his half-century-long (and still counting) career, Hefner has taken on just about every media job title possible at one time or another, including writer, editor, publisher, television producer, and on two separate occasions, TV personality. The first question that comes to mind (after what is it like to live with three women at once?) is how did an ordinary guy from the Midwest with no formal business training achieve such wild success?

Watts has an answer: timing, marketing and naked women. These three factors, combined with Hef's



almost maniacal work ethic, helped to make Hugh Hefner a household name and usher in the era of *Playboy*.

One of the book's greatest strengths is its access to the still-living Hefner. With Hef's approval and cooperation, Watts was able to get a wealth of first-hand commentary in addition to the many interviews he has given over the course of his life.

Hefner was born in Chicago in 1926 into what he describes as a "repressed Midwestern Methodist home." In interviews throughout his adult life, Hefner has pointed to his rigid "Puritanical upbringing" as one of the major factors contributing to his later rebellion through the salacious pages of *Playboy*. However, as Watts points out, Hefner's insistence that his parents were unyieldingly moral and cold may in fact be a myth he created to explain his fascination with sex.

Indeed, much of Hefner's persona is a self-styled marketing device designed to help move magazines. The Hefner America knows is a suave ladies man, so devoted to leisure and "the good life" that he spends the entire day in his pajamas and iconic smoking jacket. However the real Hefner, the dissatisfied family man who founded *Playboy* in the 1950s from his tiny living room, is far different.

Playboy was born out of Hefner's general discontent with his life. After a brief stint in the military during World War II (he never saw battle), Hefner was, as Watts

puts it, "at loose ends." He longed to be at the center of a fast-paced and exciting scene, but he was hindered by his natural shyness and the mid-century emphasis on family values, which he found stifling.

After a few failed attempts to make a splash in publishing, Hefner decided to start his own magazine that would cater to the fantasies he had for his own life. He described the initial concept for *Playboy* thus, in a letter to a potential investor: "I'd like to produce an entertainment magazine for the city-bred guy — breezy, sophisticated. The girly features would guarantee the initial sale — but the magazine would have quality too." Remarkably, after a labor-intensive few months of work funded by the meager contributions of friends, Hefner was able to do just that.

The *Playboy* success story is an incredible one. The magazine took off immediately and orders from distributors doubled and tripled from one month to the next. Though the editorial content was good, it was the scantily clad cover girls and centerfolds that moved magazines. Watts points out that while much of *Playboy*'s success can be attributed to Hefner and his team's round-the-clock work and dedication to content and promotion, the magazine's timing also had much to do with making it a hit. Writes Watts, "The magazine offered an exciting vision of the good life for a society that, without totally being aware of the fact, was yearning to lead it. *Playboy* began bringing a submerged collective social fantasy to the surface."

A large part of this fantasy was a more liberal approach to sexuality. Hefner's pin-up girls (dubbed "playmates," and later "bunnies" to complement the mag's rabbit logo) hit newsstands on the verge of the sexual revolution and the "free love" movement. While images of sexuality were, up to this point, regarded with shame and guilt, *Playboy* presented sex as something normal and healthy. Additionally, a large part of the *Playboy* ethos was devoted to consumerism and the joys of buying. This coincided with America's newfound wealth and leisure time in the wake of World War II.

With a successful publishing operation in place, Hefner turned his attention to other projects. He began selling branded merchandise as early as the mid-'50s, an enterprise that is still going strong. The

'60s brought *Playboy Penthouse*, a TV series produced and hosted by Hef that took place at a weekly staged cocktail party on a set designed to look like a chic bachelor pad. Made up of hip musical acts and interviews with figures from the art world, the show's purpose was to distinguish the *Playboy* brand from pornography, and associate it more with culture and "the good life."

Playboy Penthouse was just one example of the effort Hefner and his team made to establish a brand. Over the years, Hefner himself became a marketing tool. Though Hefner had always been something of an "average Joe," he devoted himself to becoming the poster boy for the *Playboy* lifestyle. Divorcing his wife in 1959, he began to date women in droves, cultivated his signature pajamas and smoking jacket look and started throwing lavish parties at the brand-new *Playboy* Mansion. As the personification of his magazine, he gave readers something to aspire to, which proved to be a brilliant marketing tool.

In 1988, Hefner stepped down as CEO of Playboy Enterprises, Inc. Christie Hefner, his daughter (of four total children) from his first marriage, took the helm. Though Watts spends little time describing Christie's tenure as Playboy's head honcho, he does note that she has proven to have a head for business and is responsible for the revival of the Playboy brand in recent years. While one of the book's small failings is that it neglects to address the specifics of Playboy Enterprise's international business dealings (especially an \$80 million investment in Playboy TV by Venezuela's Cisneros Group in 2000), Watts does mention that Christie has succeeded in spreading the Playboy gospel to far-flung corners of the globe.

Operations at Playboy Inc. under Christie's watch have no doubt lost some of the pizzazz of the early years, when Hef and his bachelor employees worked hard and played harder, but she and her father are in accordance on most business decisions. Plus, the antics that took place at the Playboy office in the early days would hardly fly in today's PC world.

Relieved of his CEO duties, Hef was free to become a full-time man of leisure. With an ample (but undisclosed) monthly allowance from the company, Hef could now soak up the good life on a full-time basis.

However, Watts stresses throughout the book that Hef's commitment to the swinging lifestyle often took a toll on his personal life. With two ex-wives, children who grew up virtually fatherless and a years-long pharmaceutical speed addiction under his belt, Hef's personal life has not always been happy. Nevertheless, Hefner seems to have achieved his fantasy, as proven by *The Girls Next Door*. He began taping the show in 2005 at age 79, easily making him the oldest bachelor on television. Now at 82, recent entertainment industry rumors have hinted that he has dumped his harem for a set of 19-year-old twins. No matter what can be said about Hefner as a businessman or womanizer one thing is for sure: he's still got it. **ES**

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NATPE Buyers

(Continued from Cover)



Greg Phillips, president of Fireworks International

and the suites at THEhotel to find out the repercussions of the economic meltdown, if and how their buying plans for the convention have changed, and what type of content they think will prove the most resilient.

True to the saying, "When the U.S. catches a cold, the rest of the world gets pneumonia," Canada has been hit hard by an economic crunch and recession. Telelatino (TLN), a Toronto-based broadcaster that caters to Canada's Spanish, Italian and English-speaking populations (see related story on page 22), plans to weather the storm by continuing to appeal to its niche audience. "Everyone has been affected by the U.S. financial crisis to some extent," said president Aldo Di Felice. "Broadcasters in Canada have not been immune."

As for his plan of attack, Di Felice said he will "continue to be as prudent as always and look for programming that will help our business." This will include talking to U.S. studios as well as Latino broadcasters, and depending on attendance, producers of original Italian programming. "There are a lot of different genres we're looking for," said Di Felice, "Soccer, telenovelas and movies are some of the big ones."

Mexican buyers are in an even stickier situation than those from Canada, according to Carlos Sandoval, an Acquisitions exec for Televisa. Sandoval and his team have had to rethink their entire buying strategy for 2009 because of the recent devaluation of the Mexican peso. "We are still analyzing our budget for the year due to the negative effects of the exchange rate. The peso devaluated more than 25 percent from 2007, which will definitely affect our purchasing decisions." Thus, Sandoval said that he would be using NATPE primarily to "focus on talking with our partners about the economic crisis and the problems generated by it."

But despite the grim financial climate, Televisa will still have its feelers out for new content. "We'll be meeting with our

main distributors to see their new productions for the year and determining what will fit with our programming needs," he said. And though the company's buyers plan on exercising extreme caution with new purchases, Sandoval stressed that they are always looking for animation, tween live-action programming, films and primetime series.

Zane Bair, U.S. manager of Sydney, Australia-based Seven Network, said that his company is facing its own financial difficulties Down Under. "The Australian dollar has dropped considerably against the U.S. dollar in recent months," he said. "Plus," he added, "Advertising revenue is depressed as it is in the U.S., which is certainly a concern that affects the company."

Although Bair and his Acquisitions team don't have major buying expectations for NATPE, as they usually make deals with studios outside of the market setting, they will be on the hunt for "that new special gem of a show" which could become an hit on Australian TV. For Seven Network, that "gem" will probably be a format, reality show or comedy series, which Bair described as "major factors of interest." In general, he noted that he expected reality programming to be a hot commodity again this year. Additionally, Bair confessed that he would be browsing distributor stands for inspiration, to stimulate new ideas and to see what is out there.

In addition to those attending NATPE in a purely buying capacity, the market also features a host of companies that purchase content to fill their distribution pipes, who will be at the market acquiring regional rights (mainly for Latin America) and/or international rights.

New York-based Bender Media Services is one such company and principal Susan Bender said that she has been doubly affected by the financial situation especially because her firm both acquires and distributes programming. She noted that reduced budgets will make for a more frugal atmosphere on the floor and in the suites this year. "Buyers will have to be much more selective," she said. Fortunately, Bender and company have been doing brisk business buying and selling *Guinness World Records*-themed programming, as well as *Candid Camera*-type shows, so she expects to have a very productive NATPE, the recession notwithstanding.

Nat Abraham, head of Acquisitions and Sales for Toronto-based Breakthrough Entertainment, explained that his company is doing a number of things to cope with the hard times. "We're looking to realign our budgets to maximize the impact of expenditures," he explained. For Abraham and his team, this means also picking and choosing what markets to attend in 2009. "These programming markets are becoming way too frequent to attend every one," he said, "We are becoming a little more choosy in the given economy about which markets make sense."

Luckily for NATPE exhibitors, the Las Vegas convention is still a must-attend.

Abraham said he will be on the lookout for a wide variety of content. "We're the largest supplier of HD music concerts in Canada," he said, "So we're always in the market for those." He also noted that Breakthrough will be trying to get as much bang for its buck as possible this year, making purchases that will give it the most mileage. Where general trends are concerned, Abraham predicted that HD programming will be "a big drawing card" on the convention floor this year.

Jose Antonio Espinal, vp of Entertainment for Venezuela and Miami-based Venevision International, was likewise optimistic about the market in spite of the financial crisis. "We just have to be more sensible regarding the economic environment," he said, adding, "As they say, the show must go on."

Content-wise, Venevision's Acquisitions arm will be "scouting for products for our film and mobile distribution operations and even content that we can incorporate into our catalogue of TV products that we distribute in Spanish-speaking markets. The company will be perusing the floor for movies and children's programming in particular, but as Espinal pointed out, they are "always open to examining commercially viable product" of any kind.

The economic squeeze has not yet had dire effects in the U.K., where the pound remains strong (if slightly less strong than usual). Greg Phillips, president of London-based Fireworks International, remarked that his team will be "looking for new shows vigorously" in Vegas. Fireworks buyers will have their eyes peeled for both scripted and unscripted programming, with a special emphasis on nonfiction, which is a growing area of focus for the firm.

Despite the fact that the company has so far been relatively unscathed by the poor state of the global economy, Phillips stressed that Fireworks would not be buying recklessly. "So far our budget plans have not been affected by the crisis," he said, "But we'll be keeping things tight and focused as usual."

When it came to predicting trends, Phillips said he didn't foresee any specific type of programming selling better than others. "The only trend I predict is programmers being as selective as ever



Susan Bender of Bender Media Services

The only trend I predict is programmers being as selective as ever and as determined as ever to bring the best to their schedules.

—Greg Phillips, Fireworks

and as determined as ever to bring the best to their schedules," he said.

For their part, NATPE organizers have put together several panels that will address strategies to help buyers better administer their budgets in hard times. One such panel, to be held on the market's January 27 opening day, is a lunchtime roundtable entitled "How Broadcasters Thrive in This Economic Climate," which will feature top TV professionals presenting tactics for buying, syndication, new media and alternate revenue streams that will keep programmers out of the poor house. However, the buyers *VideoAge* talked to scoffed at the idea of taking even an hour away from the wheeling and dealing of the convention floor to attend such panels.

Despite a slew of economic obstacles, the future looks promising, at least for the Latin American region. According to London-based Zenith Optimedia's forecast, in 2009, total advertising expenditures in Latin America will increase by 14.9 percent compared to 2008, and by 18.8 percent in 2010. In general, stated the research group, "advertisers will return to the familiarity and brand-building power of television, giving it a record market share of 38.5 percent in 2010 and 2011." ●



Jose Antonio Espinal, vp of Entertainment, Venevision International

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Shaky Economy, Floor Plans, Latins, Drive TV Market

The new year brings with it the very first television market of 2009: the Las Vegas-based NATPE. Like last year's event, which took place smack dab in the middle of the WGA writers' strike in Hollywood, this year's NATPE comes in the midst of a Wall Street-induced worldwide economic slowdown. Being the first market on the calendar year could prove advantageous to NATPE since buyers' budgets were mostly dried up after last October's MIPCOM. Now, the industry knows the full extent of cuts in their 2009 acquisition budgets, but is also ready to be first in line for new sales.

In addition to the recession, the NATPE organization is dealing with the imminent end of its longtime contract with Las Vegas, meaning that following the 2010 event, NATPE will need to find a new venue to call home. *VideoAge* spoke with a slew of NATPE exhibitors and insiders to determine how they plan to survive the economic crisis, whether it's better to exhibit on the floor or in the suites, and whether or not NATPE is still relevant.

According to Rick Feldman, president and CEO of NATPE, which will be held January 26-29 at Sin City's Mandalay Bay Resort, the market is definitely still a significant one for the industry. But he recognized that changes needed to be made in order to lure more people to the convention floor, a place that fewer and fewer distributors are choosing. As such, NATPE has made a number of



RCTV's Guadalupe D'Agostino

enhancements "on the floor" for its 46th annual edition, though they are more cosmetic than substantial. These include doubling the exhibition floor space and offering new destinations, including The What's Next Demo Lab, which will feature cutting-edge demos that showcase how technology is shaping the content lifecycle; a digital theater for demos, digital briefings and interactive chats, which will offer seating for up to 100; the Celebrity Chef Kitchen, which will showcase the hottest TV celeb chefs demonstrating their culinary skills; and a restaurant and café, which will be open for power lunches on the NATPE floor.

"The consensus was that we needed to make the floor a real destination," said Feldman. "The key is to have everyone there on the floor and not have people leave."

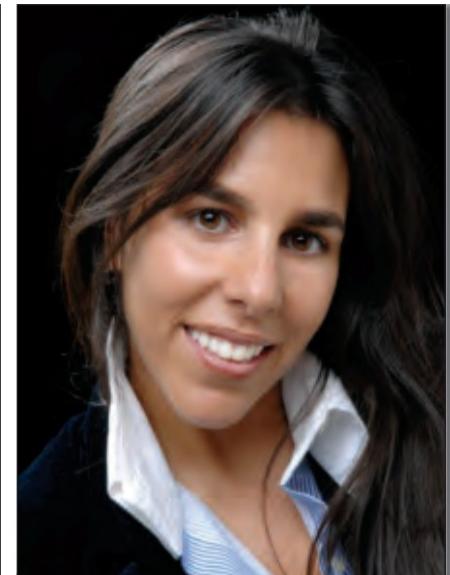
Additionally, the NATPE floor will offer a business-to-business lounge where executives can hold meetings, and a networking lounge with e-mail kiosks and electrical charging stations. NATPE will also provide free WiFi Internet connectivity throughout the exhibition floor.

Despite these innovations, many companies still prefer the tried-and-true suite option. "This year, we've chosen to exhibit in a suite rather than on the floor," said Patricio Teubal of Italy's Mediaset, which will be at its very first NATPE since launching a scripted formats distribution unit. "Given that most telenovela distributors are traditionally located at THEhotel and since most of our potential

clients are the same, it will be easier to reach us." Teubal, who said that he and his colleagues have already scheduled more appointments for the upcoming NATPE than he had for last year's conference, also noted that the sad state of the economy will definitely affect the business done in Vegas. "In this period of recession, TV channels have lower advertising budgets and therefore, lower budgets for production. For this reason, we're focusing on formats that request low budgets — though we have alternatives for all budgets." Like many NATPE attendees, Mediaset plans to focus on a number of Latin territories, including Argentina, Brazil, Venezuela, Uruguay, Peru, and Chile, but will also be seeking out U.S. and Canadian partners.

Like Mediaset, Miami, Florida-based Televisa Internacional will also take a suite at THEhotel. The company, which will be hawking an eclectic slate of telenovelas, series, entertainment formats and licensed product, including animated series *El Chavo* and soap *Mujeres Asesinas*, will also focus primarily on Latins. "For many years NATPE has been and continues to be a very important market for Latin America," said Claudia Silva, director of Sales, Licensed Product and Pay-TV for Televisa. "And in recent years, clients from Asia and Europe have been attending, which has been very good for our business. More than ever, NATPE is related to content. This is a great opportunity for us because we have the most extensive library of Spanish-language content in the world, allowing us to become a one-stop-shop for clients around the world."

Argentina's Telefe will also be exhibiting at a suite in THEhotel alongside its telenovela-producing brethren. According to Michelle Wasserman, head of the company's International Distribution division, NATPE 2009 promises to be very lucrative for Telefe. "We expect a good market with regards to meetings, contacts and business discussions," said Wasserman. "However, we believe that the market will have its peculiarities, and we can estimate those after having gone through a couple of markets during this budding economic crisis." Wasserman believes that the industry's production level will not vary much seeing as how TV stations always need content. "We believe that ready-made content, unlike formats,



Telefe's Michelle Wasserman

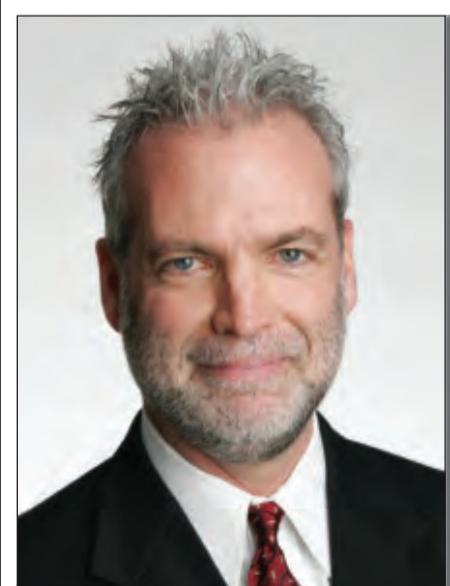
will be in higher demand."

Jene Elzie, vice president of International Sales and Strategic Planning for Comcast International Media Group, who will once again be holding court in a suite due to its more "intimate" feel, said that she plans on doing much business with the Latins. "A majority of our [NATPE] clients are from Latin America, so we tailor our stuff to the Latin American market." And, she added, despite the proliferation of many a TV market throughout the year, she thinks that NATPE is as important as ever. "There are in fact many markets popping up," noted Elzie. "But many of them are more tailored — SPORTEL focuses on sports, DISCOP East focuses on Eastern Europe. NATPE is certainly still relevant, especially with the number of Latins in attendance. It's a more regionalized opportunity for us."

While some TV firms are embracing what many hope will be the future of NATPE — suite exhibition — others are still clinging to that old standby, the convention floor. "We will exhibit on the floor, as always," said Ron Alexander, director of International Sales at the Chantilly, Virginia-based Teleproductions International, Ltd. (TPI). "The mix of hotel exhibitors and convention floor exhibitors is a bit odd and not convenient for buyers in general. We've always been advocates of a presence on the floor. In addition to our regular buyers, we like the opportunity to meet drop-bys." Despite the sad state of the economy, Alexander



Patricio Teubal of Mediaset



Cookie Jar's Dan Waite

(Continued on Page 12)

JANUARY 2009

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A Player On The World Stage

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NATPE Preview [cont'd]

(Continued from Page 10)

believes that TPI, which will be in Vegas showcasing docudrama *Run or Die: The Fernando Araujo Story*, will remain unscathed. "There will certainly be economic concerns at NATPE '09 on the domestic side of the business. However, TPI focuses on the international market and we believe the international business — especially for acquisitions — will stay strong."

Dan Waite, from the Los Angeles offices of Canada-based Cookie Jar, said that his company will also stay true to the floor this year. "We'll be in the kids' pavilion,"

he said. "I prefer being on the floor. You get more traffic that way." Waite, who will be promoting such animated Cookie Jar fare as *Magi-Nation* and *Hurray for Huckle!*, noted that while he, like everyone else, is worried about the economy, he's confident that Cookie Jar will do well at NATPE. "People are being more cautious as to how to spend money," he said. "There have been big fluctuations in currencies in Latin America so people are watching their programming budgets closely. Despite this, my business has stayed steady. I still have contracts coming

in." And while many of his colleagues have opted out of the convention floor booths, Waite said he sometimes wishes that things could be as they once were. "I wish we could do it in the old style," he said, "have everyone back in one place on the floor. But I certainly understand the economics of it." But, added Waite, if he had it his way, once NATPE is forced to leave Vegas, he hopes it'll return to New Orleans, a region he said he would love "to help get back on its feet."

Like Waite, Sheila Aguirre, vp of Sales and Development, Latin America and

Hispanic USA for the U.K.'s FremantleMedia Enterprises (FME), will also be taking a place on the floor at NATPE 2009. "FME is bringing its full international sales team," said Aguirre, "so the floor allows us a big enough space to accommodate the whole group." While Aguirre admitted to being a bit worried that "the economic climate will make buyers more selective," she's confident that things will work out in FME's favor. "I believe the U.S. Spanish-language channels could benefit from our catalogue this year because, during this difficult economic period, our finished programming catalogue offers them an option to bypass high production costs. They can also localize some of our programs by adding a popular regional host or using segments to create a program. There are many resourceful and creative options available to them, which we would be keen to help them realize," she said.

Another company exhibiting on the floor this year is Sherman Oaks, California-based Rive Gauche Television. According to Dorothy Crompton, senior vp, International Sales for the firm, "NATPE is still very much relevant as it allows Rive Gauche to be very focused on its Latin American clients." The company, which will be bringing a number of series to Vegas, including reality shows *Scare Tactics* and *Bear Whisperer*, is hopeful, but, said Crompton, "because of the cloud hanging over the worldwide economy, we are unsure how that will affect the market."

But regardless of how many companies are still choosing to rough it out on the floor, many insiders suspect that in the future, NATPE will be an all-suite market. Guadalupe D'Agostino, vp and general manager of RCTV International is one individual who's seen the light and switched to THEhotel. "We have shifted from our former stand on the floor to the hotel suite because given the fast-paced rhythm of the festival, it's the most comfortable atmosphere to conduct business in at NATPE," she said. And despite what she terms the "volatile times" we are living in, she said she's "optimistic" about things. "With the worldwide transition to a digital signal around the corner and the need for more content and a healthy and productive industry, NATPE 2009 looks very bright."

As usual, NATPE will host a slew of seminars, including a keynote from Lionsgate's Jon Feltheimer, a Think Tank hosted by Disney's Anne Sweeney and a presentation called: "Digital Studios: Where's the \$\$\$?" While it remains to be seen whether the current economic climate will yield stormy skies or smooth sailing for the market, one thing is clear: for the Latins, NATPE will just be business as usual. **LHR**

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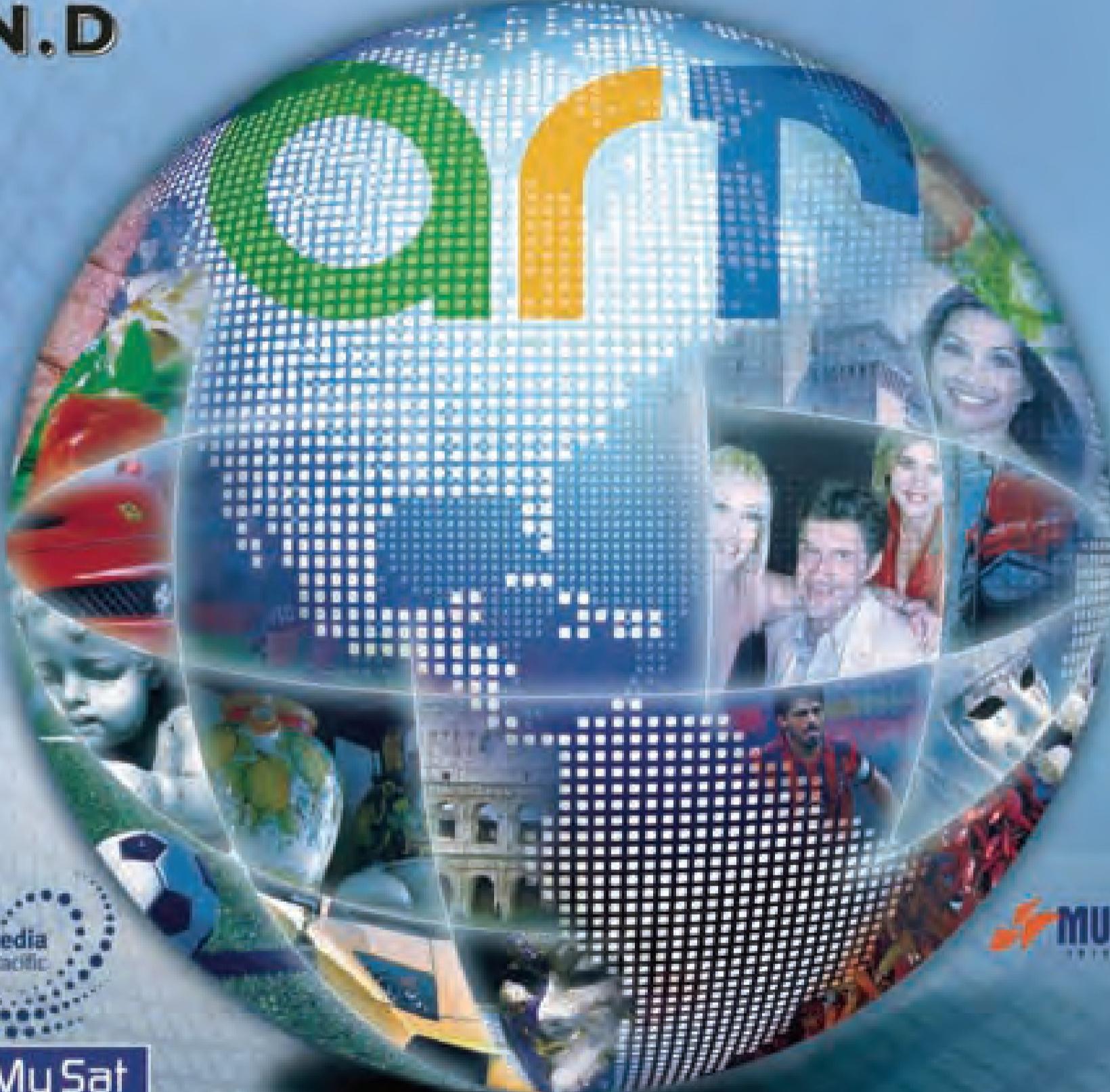
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The Content Biz Gets Chaotic Under Stress

By BOB JENKINS

In 1953, the English writer, L.P. Hartley opened his most famous novel, *The Go Between*, with the observation: "The past is another country; they do things differently there." Today, he could as easily have been speaking of the future of the content business, due to a combination of a growing worldwide financial crisis and new media inroads.

Revenue streams will not only be shrinking under recessionary pressures, but they will also be moving, sometimes dramatically, between platforms and business models under the influence of technological innovation, which is, right now, changing forever the way in which content is consumed. In the future, the industry will have to do things very differently.

This, of course, begs many questions, two of which are, which genres will change favor, and which will tomorrow's altered universe condemn? Some of the answers are fairly predictable and others much more surprising. But of no surprise to anyone is the fact that virtually everyone *VideoAge* has contacted for this story thinks the genres in which they are grounded will be fine, and that, consequently, there is a great deal of disagreement as to who will prosper and who will suffer in the future.

Tobias de Graaff, director of Global Television Distribution at the U.K.'s ITV Global Entertainment, said he believes that the future is secure for "long-running drama franchises such as *Heartbeat* and *Coronation Street* because they cost less to market than a brand-new short-run series, they are well known, their place in the schedule is secure and they have a loyal fan base." De Graaff also said that "high-quality drama will always continue to travel well," adding, "we are finding that big channel brands are now attracting a higher price as broadcasters are in competition with each other to secure ratings winners."

In contrast, Patrick Svensk, CEO and president of Zodiak, which has headquarters in both London and Paris, saw a dim future for "high-end programming," saying, "it is bound to suffer. At the very least such projects will take a lot longer to get greenlit."



ITV Global series *Heartbeat*

A growing focus on the cost of programming is one of the easier predictions to make about the future of the entertainment business, which probably explains why everyone is making that prediction, while simultaneously laying claim to having exactly the low-cost, ratings-gathering content all broadcasters will be looking for in the immediate future.

Speaking at the press conference called to announce the organization of all the many production brands, including Marathon, Diverse Productions, Magnolia, Mastiff and Mastiff Media, YS Film, Tele Images, and many others now owned by Italy's De Agostini Group under the Zodiak brand, Svensk's colleague and svp, Fiction, Pascal Breton commented: "In the coming economic downturn libraries will be very important, especially in the digital arena." Of course, De Agostini now has one of the largest independent libraries in Europe, and Breton went on to note that "the demand for content will not evaporate, but the budgets available for acquiring this content will, if not evaporate, then certainly come under pressure, and so the ability to meet a high volume demand at a low unit cost will be very important."

Meanwhile, Natalie Humphries, the recently appointed head of Factual at U.K.-based Shine Reveille, celebrated her new position by lauding the relatively low cost and proven ratings success of factual programming over genres such as drama and entertainment, claiming to know of several such projects being cut back while actually in production.

ITV Global's de Graaff by contrast, claimed: "We all want to turn on our TVs to switch off from the doom and gloom, and so well-made, uplifting, humorous programming will be a definite winner."

But predicting the winners and losers in the new world that awaits is a much more complex matter than some of the temptingly straightforward arguments currently being aired might suggest.

For one thing, some genres, such as sport, seem to be impervious to cost-cutting pressures. There might be a recession on, and advertisers might be deserting free-to-air channels in droves, but they can still find big budgets when they have to. At the end of November, Formula One racing supremo Bernie Ecclestone unveiled a new sponsorship deal with Korea's LG Electronics for an undisclosed sum, but one that the company itself was quoted as putting in "the tens of millions."

At the same time as Ecclestone was celebrating his news in Seoul, the International Olympic Committee was rejecting the latest bid from the European Union for the Summer and Winter Olympics of 2014 – 2016. The amount bid was not disclosed, but it has been widely reported that the European Broadcasting Union paid in excess of \$700 million for the 2010 Vancouver Winter Olympics and the 2012 Summer Games in London, and so, whatever the sum rejected actually was, it is a safe bet that what it wasn't, was cheap.



Patrick Svensk, CEO and president of Zodiak



ITV Global Entertainment's Tobias de Graaff

Other than its obvious universal appeal, another key value of sport is its ability to perform across many different platforms. The importance of a genre's ability to do this is neatly underlined by New York-based accounting firm PricewaterhouseCooper's "Global Entertainment and Media Outlook: 2008 – 2012," an annual report analyzing the global media market. In it they predict subscription television revenues will increase by a compound annual rate (CAR) of 9.3 percent, hitting a total \$214.2 billion by 2012, video-on-demand is set to rise by a CAR of 23.5 percent reaching \$12 billion globally by 2012, and pay-per-view by 4.9 percent, CAR peaking in 2012 at \$5.3 billion globally.

Anything celebrity also seems like a good future-proof bet. U.K.-based Channel 4's *Big Brother* might no longer gain the nine million-plus audiences it once did, but at an average of 3.2 million over its last run it easily outperformed the news with an average of 800,000 and property shows with averages between 2-3 million. At the polar extreme to celebrity, business news and its reporters are enjoying an unprecedented jump in popularity with comScore Media Metrix, a U.S.-based Internet audience measurement firm, reporting last September a year on year 30 percent jump and nine percent month to month climb in visitors to financial news and research sites, while in the same month cable/satellite TV network CNBC reported a 20 percent audience increase and the one-year-old Fox Business network, a jaw-dropping 127 percent increase in the U.S.

To conclude with some bad news, it can be said, with the exception of those lucky enough to have very well established major brands, kids programming is one area likely to see a lot of suffering. But more critical to kiddie programming's future well being is its heavy dependency on retail sales of ancillary products, not an area many analysts tip for immediate growth potential.

But, as L.P. Hartley would undoubtedly say, let's first hope we'll all reach the place called the future. ●



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Singapore Takes Its Film And TV Media Seriously

Singapore can best be described as a huge, clean, rich city-state shopping mall. In this former British colony, business is a way of life. People's lives are orderly, organized as to facilitate shopping, with the various commercial centers all interconnected with underground and aboveground alleys to shield from the tropical heat. During the winter months the walkways also protect from the rainy season, although during the Asia TV Forum (ATF) it only rained once.

Business in Singapore is revered as a religion and all public places, such as the airports, are geared to facilitate it with free Internet services, quick bureaucratic procedures and inexpensive mass transit. Even though there are four unrelated official languages (Mandarin, English, Malay and Tamil), English — and American English at that, not British — is the language that unifies the close to five million residents, 75 percent of whom are of Chinese origins. "Singlish," a blend of many languages, is also becoming popular among young people.

Parade, the weekly magazine that reaches 32.4 million U.S. families, listed former Singapore prime minister and current minister mentor, Lee Kuan Yew, as one of the world's five most influential politicians because he first oversaw the separation of Singapore from Malaysia in 1965 and, subsequently, transformed



Buyer Masa Omiya from Japan's TWA

Singapore into a state with a developed capitalist economy.

Another vital element of Singapore, in addition being Asia's media hub, is the influential role played by the Media Development Authority (MDA), the government agency created to stimulate film and TV production, co-production and media investments in general, both on the island and internationally. Last May, MDA boss Christopher Chia said that there is some SGD500 million (U.S.\$385 million) available for film, TV and games development across 13 funds based in Singapore. According to official reports, Singapore now has ambitions of

becoming a global media hub by 2015.

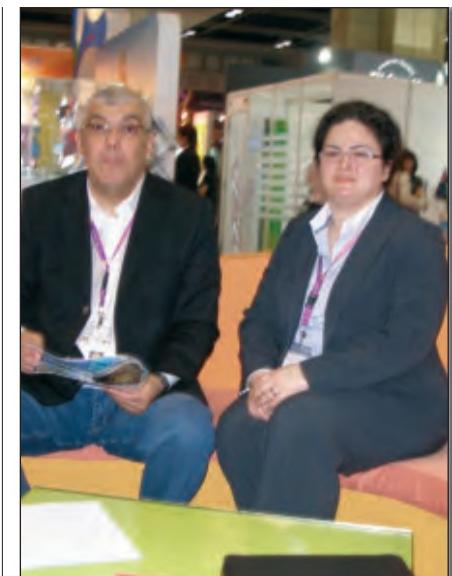
Naturally, MDA also plays an important part within ATF, with a large presence in the form of both the numerous amount of people attending and large size of its stand. It is in this environment that ATF is starting to prosper after nine editions, all organized by Reed Exhibitions, which maintains its Asian base right in Singapore.

ATF 2008 took place last December 10-12, and was held for the first time at the Suntec Convention Centre, a large complex conveniently located near all major hotels. In 2007, the market took place at the Shangri-La hotel and used suites as offices. This time at Suntec the TV trade show changed into a stand-based market, which increased cost by an average of 30 percent, but, at the same time, increased traffic for exhibitors.

On the market floor there were some 112 individual stands and six umbrella stands, including the ones that grouped French, Korean, Spanish and Taiwanese TV distribution companies.

The French Ambassador to Singapore toured the French pavilion organized by TV France International and, later, he sponsored a buffet and champagne luncheon for French distributors, buyers and international press.

Other distributors came from places such as Italy, Argentina and as far as the state of Virginia, in the case of TPI.



Qatar-based Al Jazeera Children's Channel's Mahmoud Bouned and Christiane Salem

During the opening ceremonies, Michelle Lim, general manager of Reed Exhibitions Singapore and Malaysia, indicated that there were close to 700 participating companies from 50 countries, representing 15 percent growth from last year's event.

According to official figures, there were 321 sales companies from 39 countries. Of these, the ATF's official guide listed 210 as exhibitors, mostly housed under the umbrellas of the France, Korea, Malaysia, Singapore, Spain and Taiwan pavilions. Officially there were also 298 buying organizations from 31 countries. The total number of attendees was estimated at 1,400 people.

An informal survey among a small group of exhibitors revealed a good number of active buyers from territories such as Vietnam, Korea, Hong Kong and even Japan.

Racquel Mesina of Canadian exhibitor Cinemavault reported that the majority of her buyers were from Singapore, followed by Indonesia and India, and that the majority of meetings were directly with broadcasters. "The market proved quite conducive for initiating deals," she commented. "I found there was a fairly even split between buyers seeking family friendly programming and those wanting action and adventure films."



French Ambassador to Singapore, Pierre Buhler, I., during a visit to the ATF, next to TV France International's president Jean-Louis Guillaud and executive director Mathieu Béjot



Florida-based Dori Media's Jose Escalante, I., and Andres Santos

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DORImedia GROUP

Asia TV Forum [cont'd]

(Continued from Page 16)

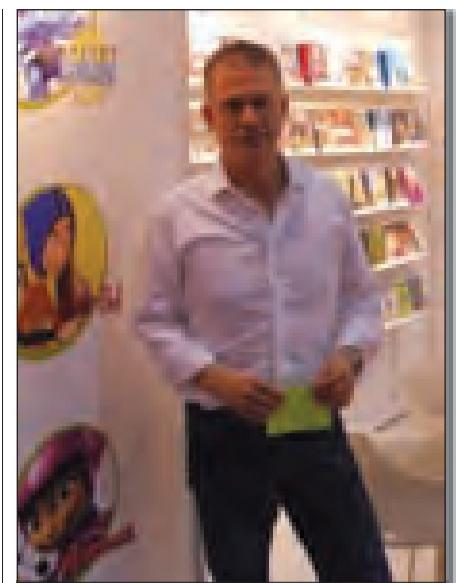
Sabrina Toledo of Connecticut-based CableReady saw most of her buyers coming from Malaysia, Indonesia, Hong Kong, Korea and the Philippines. "All of these countries are a relatively short plane ride away from Singapore, so it's an easy decision for them to make the trip over. And I'm sure that for several buyers, the lure of shopping in Singapore was an added bonus to the market's location!" she said. Toledo added that, "almost all of my meetings were with networks, either terrestrial or cable/satellite (both national and pan-regional). Because ATF attracted so



Brazil-based Record TV's Edson Mendes, L., and Delmar Andrade

many terrestrial buyers from all over Southeast Asia, formats were in high demand since these networks are mostly successful with local content. In terms of factual, wildlife/nature programs were going strong, as were entertainment and celebrity-oriented series."

She also explained that "there was some activity for sales, but our success was mostly found in either introducing ourselves to buyers and initiating deals, or catching up with existing clients in the region — moving deals along to the next step and making sure we're all up to



Germany-based Studio 100's Patrick Elmendorff

date with each other."

As far as the market-associated seminars were concerned, there were seven such activities, all basically of little relevance and all scattered throughout the market's three days, with one, the Media Financing Forum, taking place the day before the market started. Other related events were the opening party at popular nightspot Zouk, that started at 7:30 p.m. and featured plenty of drinks, but not food, and the Asian Television Awards, which was basically a local event with no international ambitions.

During ATF it was announced that the construction of Mediapolis studios, in the Singapore district of Buona Vista, would soon begin. The SGD120 million (U.S.\$82.4 million) mega soundstage is to be completed by 2011 with facilities for high-definition and 3D movies. It was also announced that Hong Kong's Salon Film Group has established a new SGD100 million (U.S.\$68.7 million) media fund, which will go towards financing Singapore's films, TV series and video games.

In terms of magnitude, the media industry annually contributes over SGD5 billion (U.S.\$3.43 billion) to Singapore's GDP and employs 54,000 people. ●

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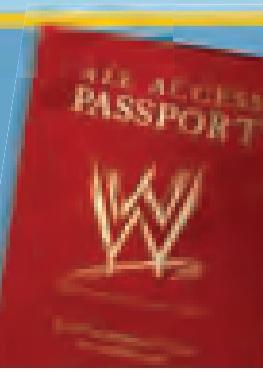
TPI's Larry Higgs, L., and Ron Alexander



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Brazilian TV Welcomes Challenges, Opportunities

BY MARIA ZUPPELLO

The year 2008 has been the year of Brazil. The Brazilian film industry's international stature has been growing, and the TV sector has expanded internationally. The year started with director José Padilha's *Tropa de Elite* (*The Elite Squad*) taking home the top prize at the Berlin International Film Festival, and ended with the international success of director Cao Hamburger's *The Year My Parents Went on Vacation*.

"The Brazilian Film industry is literally booming," commented São Paulo-born *Blindness* director Fernando Meirelles, to the international press while promoting his film with star Julianne Moore, who leads an international cast. "And it's only the beginning," he added.

With these recent success stories, Brazil is beginning to be seen not just as a country that exports telenovelas, but also as one in which the film sector is showing real promise, and its products (both cinema and television-related) are sold all over the world.

"It's a terrific opportunity that we have, creating new markets for our content," said Delmar Andrade, International Sales director for Brazil's TV Record, which in the last two years has grown its sales an astonishing 130 percent. This effectively penetrates the Brazilian market, which for years has been dominated by Rede Globo. Now at number two, TV Record recently announced it has acquired the exclusive Brazilian rights for the 2011 Guadalajara Pan-American Games. In addition, it confirmed a deal with Mexico's Televisa for the co-production of telenovelas in Brazil. International sales will be divided between both companies.

And TV Record is not the exception to the rule. All over the country TV channels and independent producers are doubling their output with new and original products.

"The Brazilian market has for years been an atypical market," said Elisabetta Zenatti, Program director for Bandeirantes, one of the few broadcasters able to stay competitive in the "hot" Brazilian domestic TV market. "Globo has always dominated the scene by producing everything by itself." For independent producers, that meant that life has not been easy. "We learned to survive," commented Denise



TV Record's *Mutantes, Caminhos do Coração*

Gomes, a Brazil-based independent producer, and partner in the country's Bossa Nova Films. "Many of us were forced to turn to advertising." But that scenario is changing, according to Gomes, especially after the federal government launched TV Brasil, a non-profit, public broadcasting TV channel.

The reason the Brazilian TV and film market is booming is due to a number of factors, including national economic growth of up to six percent last year; a well-regulated production environment; and, most importantly, financial investments made through tax incentive laws.

"There is tremendous filmmaking originating in Brazil right now. There are new ideas and more content," said David Linde, co-chairman of U.S.-based Universal Studios, which is ready to fund five Portuguese-language theatrical movies with as much as \$10 million each. "Things have gotten much easier in the filmmaking industry because of government incentives," said Bossa Nova Films' Gomes. "Now it's the turn of TV productions, from documentaries to series to reality shows" to take advantage of the incentives.

The rise in Brazilian production over the last few years is due to the Brazilian government's decision in the early '90s to give the country a new audiovisual policy. Among the most relevant changes in 2008 was the Ministry of Culture-managed Sector Fund, which offers loans and direct investments in exchange for equity in both filmed projects and companies. According to a press release from Ancine, the federal

cinema agency, in 2008 the Sector Fund allocated a total of \$21.8 million to production and exhibition.

Another new incentive plan, called Article 3-A, will allow local broadcasters and pay-TV programmers to invest part of their tax money due to the government in films and TV shows. This fund is expected to eventually reach a yearly sum of \$25 million.

Tax Incentive laws are beginning to stimulate the large-scale production of documentaries and serials in Brazil, awakening the talent of directors and producers. Audiovisual cooperation agreements with Mercosur — a Regional Trade Agreement between Argentina, Brazil, Paraguay and Uruguay — and other Latin American countries will, in the next few years, make Brazil one of the most important audiovisual hubs on the Latin continent.

With these changes, the Brazilian audiovisual market has become very attractive for partnerships in several areas, including co-productions through tax incentives (estimated at more than \$28.81 million per year) and co-productions for pay-TV programs (estimated at more than \$17.7 million per year).

An example of this is the 13-episode series *Alice*, co-directed by Brazilian directors Sergio Machado and Karim Ainouz, co-produced by HBO with the Brazilian Gullane Film, and distributed by HBO. *Alice* has been a success all over Brazil and now is ready to enter the international market. *Alice* is also a good test case since it showed how easily a



Elisabetta Zenatti, Program director for Bandeirantes

product of good quality could increase subscriptions for the pay-TV sector. In 2001, pay-TV peaked at 4.6 million subscribers, but between 2001 and 2004 there was a significant drop in the number of subscribers. Starting in 2004, the market picked up again.

According to Paris-based François Sauvagnargues, director of the Drama department of French/German TV Arte, "Today, Brazil is becoming more and more strategic [for Europe]. Arte is very attuned to this market and is interested in both co-production and broadcasting rights." That's the case with *O Brasil da Pré História - O Mistério do Poço Azul* (*The Mystery of the Giant Sloth's Cave*), a 52-minute documentary produced by Brazil's Mixer. Focused on the history of the South American continent and filmed in the heart of Brazil, it has been sold to Arte, SBS (Australia), RAI (Italy), TSR (Switzerland), RTBF (Belgium), CBC (Canada) and Discovery HD (Canada).

Even the more classic Brazilian soap, the telenovela, is changing dramatically. *Mutantes, Caminhos do Coração* (*The Mutants, Ways of the Heart*), which was produced by TV Record, was well received in the Asian TV market thanks to its sci-fi plot. The story is full of the transformations of men and women into vampires, felines, snakes, spiders and werewolves, which attack the streets of São Paulo disseminating evil. The cast includes U.S. actor Lance Henriksen, of *X-Files* fame.

"If you watch *Mutantes* on TV, you don't know that it's a telenovela," said TV Record's Delmar Andrade, "You might just think it's a series with really sophisticated special effects. Even the plot is new, with genetic topics being the focus."

With 44 million TV households, the Brazilian TV market is now facing a new challenge: the transition to digital television. Though it began in 2007 in the densest areas of the country, the complete transition will take approximately six years. Surveys have shown that 73 percent of the country's population is completely unaware as to what digital TV is, and what benefits it will offer. A large-scale promotion will therefore be necessary to educate Brazil's people and show them what a digital TV future can bring. ●



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Salute to TLN

Canada's Premier Tri-language TV Network Celebrates 25 Years

BY LEAH HOCHBAUM ROSNER

The year 2009 marks the 25th anniversary of Telelatino (or TLN), a Toronto-based cable and satellite TV channel that offers programming in Italian, Spanish and English. (The company also operates an office in Montreal). To celebrate this milestone, the Latino superstation is launching "Making a Better Canada," a yearlong campaign to celebrate and showcase the profound impact ethnic immigrant individuals, families and communities make on Canada. As part of the campaign, TLN will promote a number of projects, including essay contests, a children's literacy program and a slew of TV specials. To salute TLN and wish it a very happy birthday, *VideoAge* sat down with the network's president, Aldo Di Felice, to discuss what makes TLN so special to him and to Canada.



TLN broadcasts U.S. hits Raymond, George Lopez and Sopranos

"Like never before," said Di Felice, "we want to use the occasion to celebrate the civic engagement and contributions of immigrant Latino Canadians to our great country."

To observe the birthday, the network is spearheading a number of community-oriented grassroots initiatives, including launching an endowment program that will annually award a prize to an undergraduate student at Toronto's York University who writes the best essay about Hispanic life in Canada. Additionally, TLN is working with Canada's largest book publisher, Kids Can Press, to distribute books, such as "The Kids Book of Canadian

Geography" or "The Kids Book of Canadian History," to selected schools and libraries as a welcome kit to young newcomers of Hispanic descent. TLN also joined with 25 prominent Italian-Canadian families in an unprecedented pledge of \$13 million in support of the Galleria Italia (Art Gallery) of Ontario's new building.

"We're doing different things in different corners of the community," said Di Felice, "whether it be higher education, immigrant literacy or the arts. We really wanted to give back to our community, to our viewers."

Telelatino was born on November 29, 1984 after Emilio Mascia — a local entrepreneur who was known for bringing Italian films into Canada to be shown in theaters in Toronto — decided it was high time for a station that catered to Canada's millions of Latinos and Italians. The channel, which initially launched in just 4,000 homes in Toronto, quickly grew in popularity, especially after it began broadcasting football (soccer) games, doubling its number of subscribers to 8,000. In 1991, TLN's numbers increased dramatically to 500,000 homes after it became part of full basic cable service with providers Maclean Hunter and Classicom. The following year, its subscriber base more than tripled to 1.8 million homes upon being added to the full cable package with Rogers. In 1996, the channel was carried across Western Canada by Shaw Communications, increasing its subscribers to 3.12 million households across Canada. And in 1997, TLN launched on two of Canadian satellite DTH services, BellExpressVu and Star Choice. And it only kept growing from there. Today, the channel is available in nearly five million Canadian homes and can be seen by approximately 12 million Canadians from coast to coast.

Although it was Mascia's vision that first brought the channel to light, he retired as president in 1997 following the completion of a 20 percent shareholding investment in Telelatino by Shaw Cable, Canada's second largest cable company. In 1999, Corus Entertainment inherited Shaw's interest in the specialty network with the announcement that Shaw Communications would split its media assets from its cable assets. Corus now

holds a controlling 50.5 percent interest in the company. Regardless, Di Felice, who took over as president of TLN in 1998, made sure to note that the firm still holds true to its Italian community roots since 49.5 percent of shares are held by three prominent Italian-Canadian families: Italo Rosati, Joseph Vitale and Romeo Di Battista. "We have one foot in the community and one foot in the mainstream," said Di Felice. "Everythinig TLN does is reflective of that duality."

As Canada's most-watched ethnic specialty channel, TLN offers viewers a variety of domestic and international programming, including news, drama and comedy series, feature films, music specials, soap operas and live soccer from Italy, Europe and Latin America. Roughly 75 percent of programming is in either Italian or Spanish and the leftover 25 percent is in English. Its Spanish-language programming comes from a variety of broadcasters, including Univision, Telemundo and CNN en Español. The Italian programming also hails from a number of sources, but much of it comes from Italian commercial broadcaster Mediaset. For its English-language viewers, the station airs such famed U.S. series as *The Sopranos*, *Everybody Loves Raymond* and *George Lopez*. TLN also commissions independent producers to create local programming like documentaries that will target Canadians who want to learn more about their surroundings.

Telelatino also boasts a number of



digital channels. Italy's Sky TG 24, a news, information and talk channel, was launched in mid-2005, while TLN en Español debuted in 2007. The latter channel is an all-Spanish version of TLN. It is the first Canadian-produced 24-hour 100 percent Hispanic channel serving the Latin Canadian community. On top of these, TLN also distributes Video Italia, an all-Italian channel that features music, concerts, videos and interviews.

Additionally, TLN touts itself as "the home of the best international football (soccer)," and airs coverage of the world's most celebrated leagues, including more than 150 matches, such as Italy's premier league *Serie A*, *Italian Championship Soccer* and the top teams in Europe competing for the UEFA Champions League cup. And as if that wasn't enough, football fans will be pleased to find that TLN is the official co-sponsor, along with CBC, of all 32 FIFA tournaments from 2007 to 2014, including the 2010 and 2014 FIFA World Cups.

Though it may seem surprising that Canada would have a need for a channel dedicated solely to Latinos and Italians, there is most definitely a niche. According to a 2006 Census report, Spanish was the number one foreign language spoken in Canada, with 909,000 Canadians speaking the language conversationally. The number grew to more than one million the following year. Also in 2006, Spanish-speakers were the third-largest group of non-English speaking immigrants to Canada, surpassing Punjabi speakers, and behind only Mandarin and Arabic speakers. There are roughly 369,000 Spanish-speakers in Ontario, 369,000 in Quebec and 244,000 in western Canada.

Di Felice, who himself is an immigrant to Canada, having been born in Argentina to Italian parents who whisked him off to Toronto when he was just a boy, noted that he is exactly the type of



TLN founder Emilio Mascia (far left) with a group of community leaders

(Continued on Page 24)

JANUARY 2009



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Salute to TLN (cont'd)

(Continued from Page 22)



TLN president Aldo Di Felice



person a channel like TLN appeals to. "I personify the blend of cultures that TLN is seeking," he said, before adding that there are many people like himself throughout Canada.

While the channel is debuting a number of programs and initiatives designed to celebrate its quarter-of-a-century in existence, Di Felice said TLN won't be throwing itself any anniversary parties anytime soon. "We always have parties in the summer anyway," said Di Felice, mentioning that TLN will host the annual "Salsa on St. Clair" street festival in summer 2009. The festival,

which attracts over 750,000 Canadians each year, is a collaboration between TLN Television and the city of Toronto, and celebrates Latin culture with a parade, a carnival and general revelry. "We didn't want to wait 25 years to celebrate," he said with a chuckle. "We always celebrate."

Di Felice hopes that the anniversary and all its initiatives will show Canucks that the Latino community there is chock full of good will and good intentions. But most of all, he hopes that people will continue to be entertained by the channel. "What we, as a channel, always seek to do is to entertain," he said. "However, we'd also like to cultivate some pride among the communities that we represent, as well as to be welcoming to newly arrived Hispanic Canadians. We want to celebrate them and to promote Latin culture to mainstream Canadians all under the mandate of entertaining." ■

MAKING A BETTER CANADA

To celebrate TLN's 25th anniversary, a yearlong campaign, "Making a Better Canada," was designed to celebrate and showcase the profound impact ethnic immigrant individuals, families and communities make on Canada. The campaign includes:

Remembering Our Past: TLN's Remembrance Week TV Specials

In recognition of the 65th anniversary of World War Two's Battle of Ortona, Italy, on Remembrance Day, TLN honors the Canadian Armed Forces' contribution to the Allied efforts in Europe and Italy with the launch of three documentaries: *Canada Remembers Italy, Ortona 1943: A Bloody Christmas* and *Primo Levi's Journey*.

Learning About Who and Where We Are: TLN's "Welcome to Canada" Children's Literacy Program

Working with Kids Can Press, Canada's largest children's book publisher, TLN will distribute 40 sets of 60 titles each to select schools, centers and libraries as a welcome kit to young newcomers of Hispanic descent. The books feature titles like "The Kids Book of Canadian Geography" and "The Kids Book of Canadian History" and will promote learning about such aspects of Canada as its geography, history and multiculturalism.

Developing Strong Voices: TLN's "Mundo Canuck" Essay Contest

TLN and Toronto's York University will launch an endowment program that will annually award a grant to a York undergrad student who writes the best essay about Hispanic life in Canada.

Supporting Canadian Cultural Expression: TLN Participates in the Transformation AGO campaign

Last November marked the opening of the Toronto-based Art Gallery of Ontario's (AGO) Transformation campaign. TLN joined with 25 prominent Italian-Canadian families in an unprecedented C\$13 million milestone pledge in support of the new building designed by architect Frank Gehry. In acknowledgement of this contribution, and the leadership of the Italian-Canadian community in helping to realize this legacy, the AGO's sculpture promenade was named Galleria Italia.



TLN headquarters in Toronto

WHO'S WHO AT TLN

Aldo Di Felice

President of Telelatino Network Inc. (TLN)

A former business lawyer, Di Felice joined TLN in 1998 following the 1997 completion of a minority shareholding investment in TLN by Shaw Cable, Canada's second largest cable company.

John Montesano

General Manager, TLN

Montesano joined TLN nearly a decade ago following a stint as a columnist for *The Toronto Star* newspaper. He had also worked for 10 years as a media content creator for print, radio and TV. During this same period, Montesano was also the co-owner and editor of *Eyetalian*, an English-language magazine about Italian culture in Canada.

Lily Caputo

Spanish Programming Manager

An Argentine-born Canadian who has been with TLN for 10 years. Caputo also oversees programming for TLN en Español, Canada's first all-Spanish TV station.

Sonia Marcuz

Italian Programming Manager

Born in Italy, Marcuz has lived in Canada for over 10 years and joined TLN in 2001. Marcuz also oversees programming on TLN's all-Italian-language digital channels, SkyTG24 Canada and Video Italia Canada.

Monica Monroy

Marketing Manager

Originally from Colombia, but in Canada since 2001, Monroy has been with TLN since 2006. Monroy also coordinates TLN's Hispanic promotional initiatives across multiple platforms, including its online and live event marketing activities.

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La investigación y desarrollo en televisión se llama "Piloto"

POR DOM SERAFINI

Hace poco, en un vuelo de Los Ángeles a Nueva York estuve sentado al lado de una diseñadora gráfica que con orgullo comentó que en los últimos años, ella llevaba consigo su set de TV, prefiriéndolo a mirar streaming videos de la Internet en su computadora. Sin embargo, para poder ver películas y sus series de TV favoritas se compró un proyector de video, ya que presumiblemente, luego de un día de trabajo, al mirar en una pantalla de 17 pulgadas en su computadora, tanto ella como todos nosotros, deseaba disfrutar del entretenimiento en una pantalla mas grande. Ciertamente, la televisión significa continuidad, familiaridad y, hoy en día, pantallas grandes.



De acuerdo a la información provista por Veronis Suhler Stevenson, una firma de inversiones de Nueva York, en 2006, los hogares americanos han pasado mas de ocho horas diarias mirando televisión, mas que las seis horas en 1975. Mientras los ratings de las grandes cadenas de TV americanas siguen cayendo- todas juntas en total han perdido 3.4 millones de espectadores la temporada pasada- la gente mira mas televisión que nunca.

Una tendencia similar parece suceder con la industria automotor americana: Mientras los consumidores compran menos coches y el precio de la gasolina continúa aumentando, la gente pasa mas horas en las rutas manejando. Pero eso no me sorprende, considerando que la industria automotor americana ha cambiado el foco de su atención hace unos años atrás, cuando fue capaz de producir exactamente lo que los consumidores deseaban. Y como en la industria de la TV americana, el sector de los automóviles se está convirtiendo cada vez mas creativo cortando costos que (en el diseño) de sus productos. Es más adeptos a anticipar las quejas de los accionistas que las de su público comprador.

Hagamos algunas comparaciones. El sector automotor americano es una industria de U\$D675 billones de dólares (basado en datos para coches y camiones de bajo peso) y se estima que los tres grandes fabricantes de autos (Chrysler, Ford y General Motors) en conjunto gastan U\$D1 billón de dólares en

(Continuación a la página 34)

Ex ejecutivos encuentran verdadero trabajo como consultores

POR LEAH HOCHBAUM ROSNER

En el negocio del cine y la televisión, la vida no termina al jubilarse o cuando "se buscan nuevas oportunidades". De hecho, en muchas ocasiones, (la vida) comienza en ese instante, y de manera frecuente, dando consultoría. Allí es cuando el verdadero trabajo comienza. Pero ¿qué es lo que hace exactamente un consultor? ¿Por qué hay tanta demanda de ellos? *VideoAge* ha buscado a aquellos que lo han hecho y sobrevivido para contarlos.

La consultoría es hoy en día un arte muy demandado a nivel mundial. Nos contactamos con una amplia gama de ex ejecutivos de la TV en Europa y Canadá, pero solo fueron los americanos los mas dispuestos a hablar abiertamente. De todas

(Continuación a la página 32)

La TV Americana va más allá de sus fronteras

Todo aquel que ha viajado y pasado un rato cambiando canales en un hotel en el extranjero, sabe que la marca de la TV Americana está en todas partes y se recibe en diferentes idiomas. Gracias a una gran cantidad de reconocidas series, películas y marcas originadas en los EE. UU, pareciera haber un deseo insaciable de contenidos de TV americana en el mundo. Juzgando el crecimiento de la industria y las

(Continuación a la página 30)

La TV Americana

(Continuación de la página 29)

inversiones que hacen algunas compañías, la globalización de la TV está para quedarse.

El último año, Jeff Zucker, Director Ejecutivo de NBC Universal, expresó públicamente su deseo de expandir el negocio de los canales internacionales de NBC. Zucker fue citado en el *International Herald Tribune* diciendo que quería duplicar para el 2010 los ingresos de su compañía generados en el extranjero llegando a los 5 billones de dólares, o un 30% del total de los ingresos totales de la compañía, siendo estos del 18% en 2006.

Los expertos dicen que NBC hace estos movimientos para cerrar la brecha con otros estudios, en los que los ingresos del extranjero son cercanos al 18-23% de todo lo que perciben. Estas ganancias provienen de dos Fuentes: Subscripciones y publicidad. Un estudio que está a punto de entrar con ímpetu en el mercado internacional de canales es CBS Paramount International Television. La compañía perdió la mayor parte de sus posesiones con la división de CBS Corp. y Viacom Inc. Actualmente, los ejecutivos de CBS están explorando qué marcas utilizar y en qué géneros focalizarse cuando su canal sea global. Con casi 700.000 horas de programación en su catálogo, las posibilidades son interminables.

"Estamos en una etapa avanzada de la planificación con socios potenciales virtualmente en cada continente," dijo Reed Manville, Presidente de Manville Media Consulting, quien fuera contratado para liderar el proyecto de expansión de la CBS-Paramount. "Con tantas horas de programación, y tantos catálogos para poder elegir de ellos-tenemos los derechos de Showtime, King World y los programas de la Paramount- podemos transmitir en cualquier canal abierto o de nicho cuando se habla de géneros televisivos."

Uno de los canales que se ha mostrado como uno de los mas fuertes en el mercado de los canales internacionales es Sony, que llega a los destinos en el exterior con los canales Sony Entertainment Televisión (SET), AXN y Animax, entre otros. De acuerdo al Presidente de la Internacional Networks, Andy Kaplan, para "Sony Pictures Entertainment [el negocio de los canales internacionales] se está convirtiendo cada vez más importante," dijo.

Bruce Tuchman, Vicepresidente Ejecutivo de MGM Networks, no está dispuesto a revelar cifras, pero aseguró, "nuestros canales internacionales representan un alto crecimiento en el flujo de ganancias de MGM."

Entre los activos que posee la compañía en el extranjero se incluyen la

marca MGM, canales Premium en conjunto y asociados a otros estudios, e inversiones en otros canales de cable de entretenimientos –no bajo el nombre de MGM- tales como el canal satelital Casaclub TV en Latinoamérica y Portugal. Los canales con la marca MGM que Tuchman describió como el corazón del negocio de los canales internacionales, incluyen los archivos actuales y futuros de la compañía. Los canales llegan a decenas de millones de subscriptores, están disponibles en mas de 120 países, y tienen mas de 20 señales satelitales separadas emitidas en decenas de lenguas diferentes.

Si bien la compañía ha firmado recientemente un acuerdo para la transmisión de contenidos en celulares con Vodafone en Alemania, nuevas tecnologías tales como celulares y la IPTV solo son un complemento y no un reemplazo de los modos tradicionales de distribución- el Cable y el satélite. "La gente se ha estado preguntando si la distribución por el Cable y satélite será reemplazada en 10 años: dijo, "pero los ingresos no han sido erosionados en absoluto. Han crecido. Las nuevas tecnologías ofrecen una manera adicional de distribución, pero no reemplazan nada."

De esta sensación se hizo eco Jon Helmrich, Presidente de IBC de Los Ángeles, que ha estado involucrado en el lanzamiento de 20 a 30 canales durante su carrera, incluyendo tales como E! y CHUM en Canadá. "Si el objetivo de vender un canal internacionalmente es para obtener reconocimiento y ganancias, no hay una manera mejor de hacerlo que lanzando un canal por Cable o satélite. Si eres un canal americano y deseas tener presencia en el mercado Inglés, por ejemplo, todavía necesitas una plataforma como BSkyB o Virgin Media. Ellos siguen siendo el gran premio a ganar."

De acuerdo a Malcolm Dudley-Smith, Vicepresidente Ejecutivo de la Branded Services-Business Management, en Warner Bros. International Television Distribution, no hay una gran transformación a la vista. "La línea de negocios tradicionales siguen proveyendo audiencias masivas e ingresos por publicidad en los grandes mercados del mundo, y por ello retendrán su relevancia por algún tiempo."

De todas maneras, eso no quiere decir que la Warner Bros. y los otros estudios no vayan a buscar sacar ventajas de las nuevas plataformas disponibles para sus canales. En los últimos dos años, Warner Bros. ha lanzado diversos servicios de suscripción de audio y video On Demand para los canales de Warner TV en Asia y Europa. Estos canales siguen la ya larga y exitosa cadena de canales lineares de Warner que con su programación llega a 20 países en América Latina. "No estamos focalizados ahora solamente en dar licencias de nuestros programas, sino también creando y proveyendo interesantes canales lineares y no lineares en las ya establecidas y las nuevas plataformas posibles. Estamos cambiando de ser tan solo proveedores de licencias a creadores de entretenimiento que destacan nuestra programación."

Comentó Dudley-Smith.

Siendo los últimos en sumarse, CBS Paramount International Televisión tiene la ventaja de entrar al mercado cuando las nuevas plataformas ya han sido testeadas y mejoradas. "Tenemos nuestro foco de interés en múltiples temas," dice Manville. "Nos adaptaremos a todos los nuevos medios, incluyendo celular y IPTV. Debemos ser flexibles encontrando a nuestros clientes donde ellos desean encontrarse con nosotros. En países en los que el mercado linear está saturado, nos focalizaremos en las áreas del mercado no linear con programación VoD o SVoD."

De acuerdo con Helmrich de IBC, el éxito no pasa por el medio utilizado para la distribución, sino cómo se realiza el posicionamiento de la marca. "El éxito llega cuando una marca realmente significa algo. Debes mantenerte apegado a lo que dices que eres." Cuando fue consultado sobre cuáles son las compañías mas exitosas en crear una marca, Helmrich mencionó a Discovery, National Geographic y a MTV.

Gracias a sus countdown shows, programas de reality y noticieros del mundo del entretenimiento, E! se ha convertido en el ícono del branding. Los canales E! fueron inicialmente lanzados en SKY en Inglaterra en el año 2002, y de acuerdo a Brad Wald, Gerente de Comcast International Media Group para Europa, el Medio Oriente y África, ahora está presente en mas de 100 territorios incluido los de EMEA (Europa, Medio Oriente y África).

Diferentes canales de Style Network de Comcast fueron lanzados en aquellos territorios en Noviembre de 2007, y hay planes para lanzar el Golf Channel en 2009. De acuerdo a Wald, ganancias- y espectadores- están en alza. La torta ciertamente está creciendo en todo el mundo", comentó.

La transición de la TV análoga a la digital está alimentando el crecimiento especialmente en territorios como el Este Europeo y partes de Asia, que fueron mas lentos en adoptar los canales americanos. Según Helmrich, algunos de los territorios más pequeños tales como Singapur, Hong Kong y Taiwán, son los más prometedores, gracias a una suave transición hacia la televisión digital.

Warner Bros. está haciendo una gran inversión en el mercado de la India en particular. La compañía planea lanzar mas adelante este año un canal Warner Bros. en colaboración con su compañía hermana la Turner Entertainment Networks Asia, solo aguardan la aprobación regulatoria. "Hemos puesto nuestros ojos en India hace tiempo y estamos sumamente entusiasmados por trabajar con nuestros colegas de la Turner y en brindar un servicio nuevo a este mercado," dijo Dudley-Smith.

Mientras la TV digital en nuevos territorios brinda a compañías americanas el potencial de hacer más dinero y llegar a más espectadores, todos requieren una atención especial. "Cada territorio y cada canal es único", dice Tuchman de MGM. "No hay una



Bruce Tuchman de MGM Networks

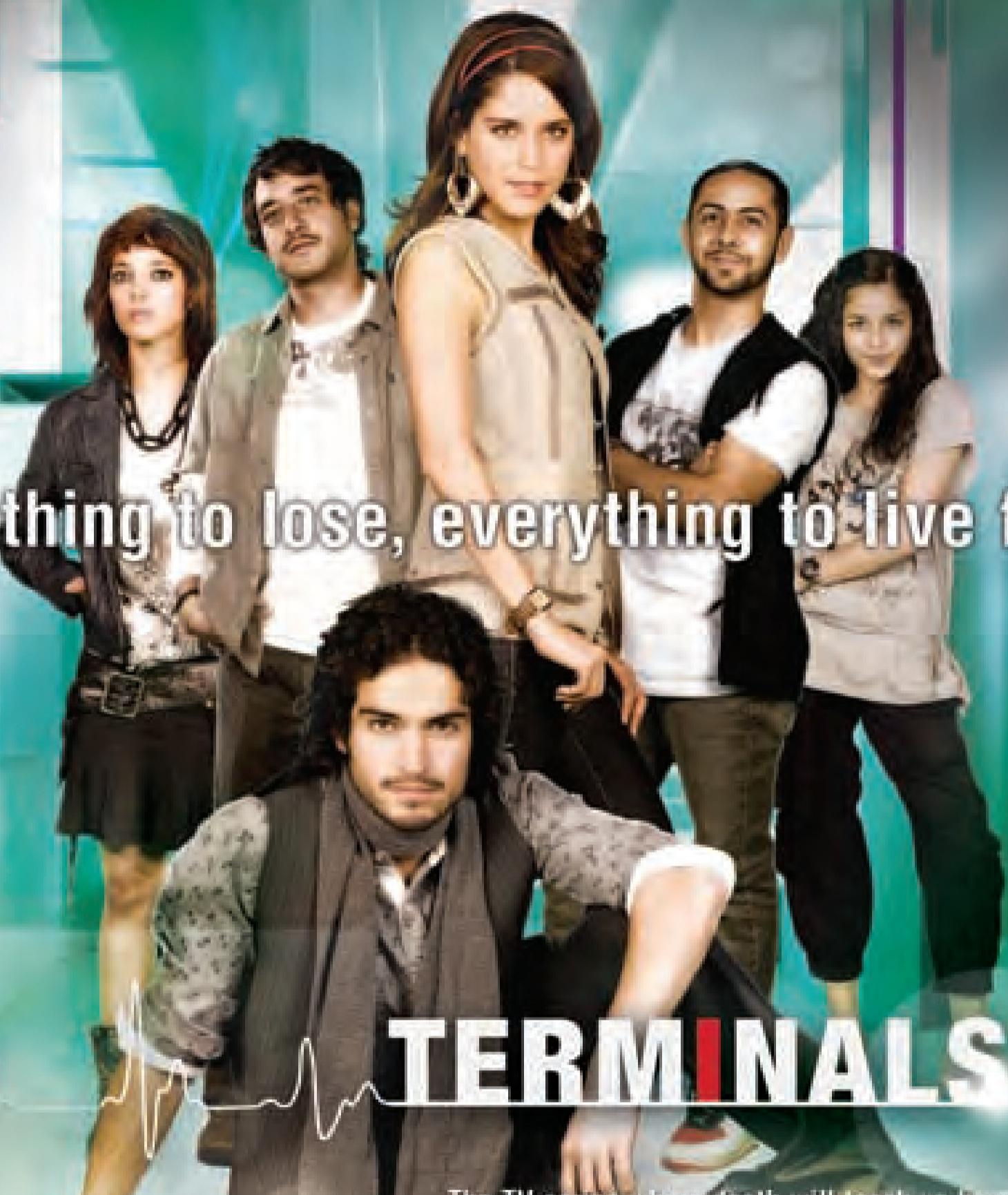
manera simple de hacerlo, por lo que debes dar apoyo a lo largo de todo el mundo. "Kaplan de Sony está de acuerdo y dice, "Debes encontrar el nicho correcto y responder a las necesidades de cada operador." También enfatiza la importancia de la localización. "Los programas americanos funcionan bien en todo el mundo," dice, "pero la clave para llevar estos canales a un nuevo nivel es la localización: Producción local original, doblado y subtitulado."

Pero la demanda de localización varía de manera considerable en cada territorio. "Algunos países, como Sudáfrica, están contentos con los shows americanos tal cual son en América, pero en otros países, como Francia por ejemplo, exigen sus propios shows," dijo Wald, de Comcast. En países que exigen un alto nivel de localización en sus programas, E! producirá versiones locales del programa countdown, de las entrevistas en la alfombra roja y en las series de noticias E!

"Nunca dos canales son iguales", dijo Helmrich, que como Presidente de IBC, da consultoría a compañías interesadas en lanzar canales internacionales. "Debes ser flexible. He visto a mis clientes gastar mucho dinero siguiendo un solo camino y luego deben gastar nuevamente mucho dinero para balancear la cantidad de programación local necesaria con la de USA."

Con cada nueva tecnología, el agregado de nuevas plataformas de distribución ha sido una bendición y una maldición al mismo tiempo. "Las nuevas tecnologías han ayudado en las transmisiones y a bajar costos. Por ejemplo, no se necesita mas doblar y enviar videos; los costos de los transponders también han bajado. Esto ha dado fuerza a la industria y permitido que el lanzamiento de canales sea mas rápido y simple." Comentó Helmrich. "Pero por el lado del negocio, es mucho mas complicado. Con las tecnologías basadas en Internet hay mas oportunidades, pero cerrar un negocio es también mucho mas complicado de lo que era hacerlo con el Cable y el satélite."

No importa de qué manera, el negocio tiende a seguir creciendo. "Se maximiza el retorno de inversión en contenidos. Los canales ven crecimiento a largo plazo y se venden mas programas que nunca," dijo Helmrich. LCB



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Ex ejecutivos

(Continuación de la página 29)

maneras, Frank Mulder, quien se retirara recientemente de su puesto como encargado de las adquisiciones de la TV pública de Holanda, comentó: "No tiene sentido ser consultor en Holanda, nada de lo que buscan los compradores es informado con anticipación. Actualmente los compradores prefieren tratar directamente con las productoras y los majors."

En lo que a dinero se refiere, un consultor aspira a tener un buen pasar,

con un ingreso anual cercano a los U\$D 200.000. Los puestos de trabajo son pocos y se presentan de tanto en tanto, permitiendo una "excelente calidad de vida familiar" para aquellos que aún tiene niños en sus casas o una esposa tolerante. Para disponer unos ingresos fijos, algunos consultores americanos, especialmente aquellos en el área de Los Ángeles, también dan servicio como expertos en juicios relacionados con disputas por temas de contratos, catálogos y precios de contenidos. Otros generan ingresos inclusive como miembros de directorios de compañías de Medios.

"Los consultores, como regla, son ejecutivos desocupados con ciertas calificaciones", dijo Norman Horowitz de Los Ángeles, un ex alto ejecutivo de MGM (y otros estudios) que trabajó como asesor hasta que fue "destronado"

al final de los 90 al llegar a la longeva edad de 65 años. "Desean contratarte para explotar tus cualidades," dijo, y continuó: "También pueden contratarte por temor. Cuando un ejecutivo deja su puesto, la gente piensa, ¿qué podrá hacer ahora por mí? o ¿Cómo podrá dañarme luego? Responden a mis llamados para estar seguros que están cubiertos.

De acuerdo a Horowitz, la palabra "Consultor" es poco correcta. Te contratan para hacer un trabajo que no es a diario y no todo el día. Pocas compañías contratan gente para 'consultar', en realidad desean que el consultor haga para ellos trabajos a medio empleo. No desean que seas solo un consultor."

Horowitz no deseaba ser consultor. Pero cayó en ello. Poco tiempo después de su salida de MGM, fue de viaje a Australia con su hijo. Comentó Horowitz: Un

productor de cine independiente me dijo: Aquí tengo una lista de películas que no pude vender allá, cuando te encuentres allí, ¿por qué no tratas de venderlas...? Cuando llegó, el Gerente de una Network tuvo un breve encuentro con él y aceptó comprar seis films en el acto. "Gané U\$D100.000 en 15 minutos." Dijo Horowitz. "Estaban comprando mi conocimiento, mi pedigrí, mi experiencia en el negocio de los Medios. Además de vender films a los australianos, Horowitz también fue hasta Hong Kong para contratar al Gerente de una compañía de animaciones y hace poco fue convocado por un productor de shows en Canadá para "hacer algo juntos."

Mientras Horowitz entró al tema de la consultoría accidentalmente, otros buscan esto como si fuera un trabajo regular. Al final de los años 90, Farrell Meisel era el Gerente General de The Movie Channel en las oficinas de Londres. Durante su cadencia, muchas veces compañías de la competencia se le acercaban solicitando su consejo. "No podía hacer nada debido al conflicto de intereses", dijo, "pero mientras tanto iba acumulando muchos contactos."

Cuando se preparaba para dejar The Movie Channel e Inglaterra, Meisel comenzó a tantear entre aquellos que habían expresado interés en sus servicios. "La primera en contratarme fue la empresa turca Ihlas Media. Los ayudé a reposicionarse," dijo Meisel, que actualmente trabaja con esa firma en otra iniciativa. "Son gente con muchas iniciativas en una zona muy conflictiva del mundo," dijo él.

Como consultor, Meisel se ve a sí mismo como un "jack-of-all-trades" (alguien muy competente en muchos aspectos sin sobresalir en ninguno). "He hecho de todo. He ido departamento por departamento para examinar el flujo de trabajo o falta del mismo (de la estación). He revisado cada componente del sistema gerencial y cómo cada departamento es manejado. Cuando entro en escena, usualmente es para hacer una reingeniería o reorganizar, no necesariamente para despedir."

La consultoría llevó a Meisel a cada rincón del mundo, incluyendo Varsovia, Rumania y el Medio Oriente, y no hubiera llegado allí de otra manera. "Es excitante," dijo, "es una tarea más difícil que un empleo corriente ya que trabajas en diferentes zonas horarias al mismo tiempo." Gusta especialmente de ayudar a estaciones de TV en mercados emergentes tales como los del Este europeo. "Allí, hay muchos canales que solo ahora están saliendo del frío profundo creado por la Guerra Fría", dijo. "Están llegando ahora a la gente que es la primera generación que no creció con la TV comunista. Las estaciones allí están mucho más predispuestas a tomar riesgos y probar cosas nuevas. No hacemos eso ya en USA."

Meisel ha escuchado mencionar que la mayoría de los consultores ya retirados en el rubro entretenimiento son condescendientes, él ve las cosas diferente.

(Continuación a la página 34)
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Ex ejecutivos

(Continuación de la página 32)

"Cuando salí de la rutina diaria", dijo, "no me agradaba hacia adonde iba el broadcasting- excesiva publicidad, excesivas repeticiones, etc. Frente a ello, debí tomar lo que sabía y tener iniciativa... Y no volver a tomar un puesto corporativo."

Mientras Meisel prospera del hecho de trabajar para diferentes compañías en diferentes ciudades en un mismo día, otros detestan ese estilo de vida. "No estoy haciendo mucho ahora", nos dijo un consultor retirado de un estudio VIP de Los Ángeles que prefirió quedar anónimo. "No quiero perder la mitad de mi vida buscando trabajo. No me agrada salir a venderme." Que bueno para él. "Los clientes vienen a buscarme. Mi reputación es conocida. La ética de mi trabajo es conocida. La gente sabe que sé sobre el tema. Si, por otro lado, fuera Juan de los Palotes, un don nadie, que trabajó años en la parte de atrás de una oficina de cine independiente, entonces probablemente debería actuar activamente para estimular mi trabajo."

El mismo día en que dejó su puesto, recibió el llamado de una firma que deseaba crear su departamento de ventas. Deseaba tener algo para hacer, pero, "era muy intenso", nos dijo, "Ya sean ocho días u ocho semanas, cuando eres un consultor, debes ir al frente todo el tiempo".

Para este consultor, lo mas difícil del

tema es mantenerse actualizado lo más posible... cuando te encuentras fuera del negocio del día a día. "El desafío es de conectarte, investigar y mantenerte en contacto con gente que puedan mantenerte al tanto."

Russ Kagan, un consultor de Nueva York que trabajó con compañías tales como la RAI de Italia, discrepa, diciendo que a través de la consultoría se gradúa con un Master cada par de años en temas relacionados con las tendencias del mercado. "Lo que amo de este negocio es el cambio," dijo, "He sido afortunado de pasar de la distribución al lanzamiento de canales, a producir miniseries, contenidos digitales para celulares e Internet, etc. En cada oportunidad, he tenido que tratar con gente diferente y diferentes compañías. Disfruto realmente de lo que hago."

Anthony Frisia, un consultor de Oak Park, California, compartió en general la visión anterior. Sin embargo dijo, "Prefiero un trabajo fijo. Hay más estabilidad. Además, con las consultorías no recibes bonos tales como seguro médico o el 401(k) – fondo de jubilación." Frisia, que comenzó su carrera como analista financiero en Viacom en 1975 y ha sido consultor de la Twentieth Century Fox, entre otras compañías, ha estado involucrado recientemente con la CAD (Computer Applications Development) una compañía de software de Burbank que creó un sistema computarizado que los estudios pueden usar para chequear la disponibilidad de los derechos de un film o show de TV en un territorio dado.

Frisia, quien menciona su especialidad en las áreas de finanzas y contratos, encuentra su trabajo especialmente reconfortante cuando está involucrado con lo que ocurre. "Veo un gran futuro para CAD," nos dijo.



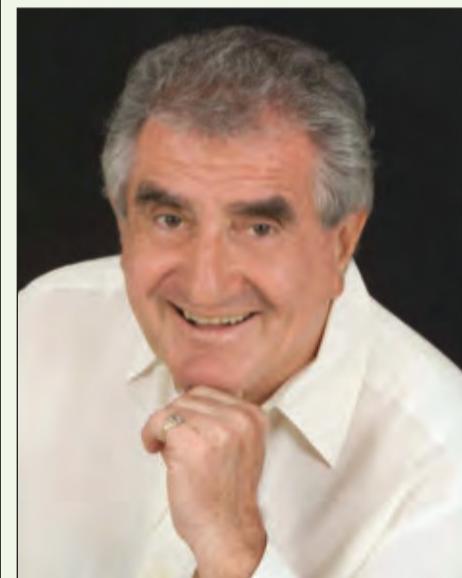
Farrell Meisel

Si estás leyendo contratos, rearmando la estructura jerárquica de una compañía o vendiendo films en todos los rincones del mundo, cuando eres un consultor, sueles pensar que trabajas solo para ti, pero estás disponible las 24 horas, siete días a la semana. "Suelo decirle a la gente

que trabajo de nueve a cinco", dice Kagan riéndose, "¡pero me refiero de nueve a cinco en cada zona horaria en la que tengo un cliente!" ●

*Los consultores,
como regla, son
ejecutivos
desocupados con
ciertas calificaciones*

—Norman Horowitz



Norman Horowitz

La investigación

(Continuación de la página 29)

prototipos, lo que constituye el 0.2% de sus ganancias anuales de U\$D465 millones de dólares (cifras de 2006). El sector de la TV americana es una industria de U\$D49 billones anuales y gasta unos U\$D200 millones en sus prototipos, o equivalentes, los pilotos de TV, representando un 0.4% de sus ingresos anuales. Estas son cifras bajas, si uno considera el Cable, el satélite, el VoD, los DVD's y otros ingresos derivados de derechos como programas emitidos en vuelos, las ganancias anuales del sector llegan a un tope de casi U\$D100 billones de dólares.

Años atrás, para ahorrar dinero, los

fabricantes de coches americanos trataron de reemplazar sus prototipos con modelos de arcilla. Este cambio se dio en particular cuando los coches japoneses comenzaron a desafiar el dominio de los vehículos americanos. Hoy, la industria automotor americana usa lo que se llama Computer Aid Design (Diseño computarizado asistido), y el resultado son grandes pérdidas.

Steve McPherson de ABC dijo en Mayo en la conferencia de Nueva York: "Si yo dirigiese una compañía automotor y decidiera producir 700.000 coches basados en un dibujo, sin un prototipo, ¿esto tendría sentido?

Se debe tener en cuenta que el costo de cada episodio de una serie puede llegar hasta los U\$D3 millones (U\$D4.5 millones en el caso de series antiguas con el incremento de salarios a los actores). Por lo tanto, cuando una network invierte U\$D 27 millones en una serie de 13 episodios (70% del costo de producción) para ganar U\$D70 millones en publicidad por 234 minutos de anuncios, ¿no sería mejor arriesgar U\$D5 millones haciendo

primero un prototipo del show? De acuerdo, nadie en el mundo siente la necesidad como en los EE. UU de producir pilotos de TV. Pero nadie en el mundo genera U\$D49 billones en publicidad, U\$D27 billones en la venta de programación local (datos del 2006), seguidos por otros U\$D5 billones por venta de derechos internacionales de TV. Siguiendo este argumento, estamos comparando manzanas con naranjas.

Actualmente algunos ejecutivos de ciertas áreas de los conglomerados de las networks quieren cambiar las reglas del juego para ahorrar U\$D50 millones de dólares al año, pero, en el proceso corren el riesgo de derrumbar todo el concepto de la integración vertical de los estudios/networks.

Y no solo eso. Un resultado mucho más riesgoso pueden ser las pérdidas en los niveles de ingresos de publicidad, que es el único modelo de negocio sobre el que se basan las networks, al menos hasta que se imponga el IPTV.

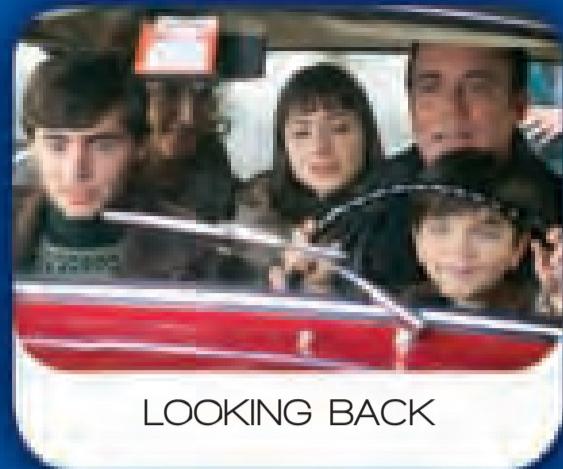
En este punto, quisiera introducir un nuevo concepto, que en realidad ha sido

utilizado desde la antigua Roma. Veamos el "Progreso" como un retorno a la edad de oro de la televisión y no como una marcha forzada hacia el futuro. Después de todo, un quiebre deliberado con el pasado nos es potencialmente creativo. En determinados momentos, la innovación puede ser subversiva, especialmente con el riesgoso negocio de deshacerse de los pilotos. Por ejemplo, ¿cómo podrán tanto los programadores como los anunciantes juzgar si habrá buena química entre los caracteres principales? Además, una escena puede resultar graciosa en el script, pero ser completamente un fracaso frente a la cámara.

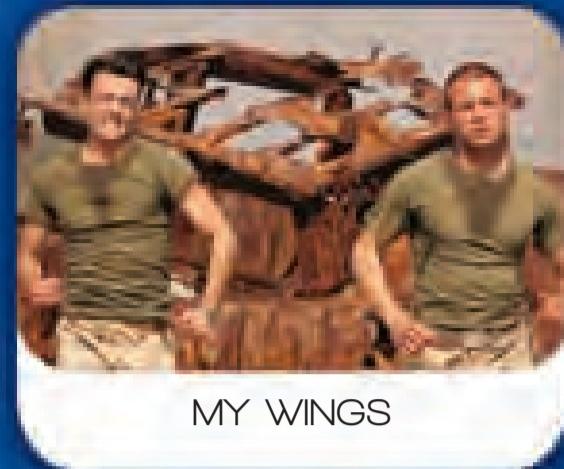
No me malinterpreten. No estoy en contra de presentar nuevos shows a lo largo del año teniendo estos una mejor oportunidad de posicionarse sin la dura competencia frecuentemente encontrada en la temporada de otoño. Pero una cosa es mejorar un producto ya existente y otra cambiarlo por algo completamente desconocido. ¡Además, no me gustan las sorpresas! ●



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Israeli Television: Small Country, Big Ambitions

BY LEVI SHAPIRO

The first broadcast in Israel was a military parade in 1968. The first commercial television industry did not even launch until 1993. This limited home market has taught a generation of Israeli content creators to cut costs and look for growth abroad. In the words of comedy writer Omri Marcus (*It's A Wonderful Country*), "we are like a sweat shop from the Far East — only instead of Nike shoes we make cheap and smart content."

The Israel Audience Research Board (IARB) estimates 1.7 million Israeli TV households, 20 percent of which are non-Hebrew Arabs. Early programming successes were either political satire or imitations of foreign formats. As one Israeli producer joked, "It isn't stealing if one Jewish comedian borrows from another Jewish comedian."

Today the market is fragmented, with a public broadcaster, two commercial broadcast networks and an 80 percent penetration rate for cable (HOT) and satellite (YES). Primetime broadcast is dominated by reality, led by Channel 2, which actually has two concessionaires. Channel 2's Sunday-to-Tuesday lineup is controlled by Tel Aviv-based Keshet, while Wednesday-to-Saturday programming is overseen by a different company, Reshet, which is also based in Tel Aviv. Those days will reverse next year.

Keshet leads the ratings race with reality programs like *Big Brother*, *So You*



Producer Hagai Levi



Avi Armoza of Armoza Formats

Think You Can Dance and *It's A Wonderful Country*. More recently, Keshet has begun exporting formats. According to Keren Shahar, head of Formats & Acquisitions, "four years ago it was hard to schedule meetings with international buyers. Now people want to hear about what we are doing." This includes *The Vault*, which aired in 18 territories, *The Successor with Uri Geller* (10 territories) and *Mythological X*.

The undisputed king of Israeli reality and game show formats is Erez Tal, executive producer of *The Vault*, host of *Big Brother* and the creator of many popular shows. Tal launched his career on Israeli Defense Force Radio, which is popular with a national audience and where many Israeli talents began their careers. "Israel is a good lab for formats. We know how to make cost-effective primetime," he said.

The launch of direct-to-home satellite in 2000 forced cable to innovate. According to Udi Miron, CEO of cable network group Ananey, which is headquartered in Tel Aviv, "the worst thing you can call an Israeli is a 'frier' [or sucker]. So the cable industry heavily promoted video-on-demand to demonstrate value." Today Israel has one of the highest VoD penetration rates in the world. "Consumers will pay for value. Kids programming does especially well on SVoD. We created pay channels for food, health, travel and lifestyle, and are beyond break-even with all of them."

On the global market, mention Israeli

TV to most program buyers and they will probably respond "telenovelas." Dori Media is the world leader, distributing over 5,000 hours of telenovela content to 65 countries and 450 TV channels. This includes owned and operated channels in Indonesia and other markets. In order to leverage alternative platforms, Dori recently launched Novebox.com, a social media and networking site focused on telenovelas. "Every day, two billion people watch telenovelas," said Nadav Palti, CEO of the Tel Aviv office of Dori Media. "This is a very stable genre and demand remains high if you effectively promote, package and program." In addition to the TV formats, Dori also produces about 1,000 new hours yearly in Argentina and Israel.

Israel's small size makes it difficult for producers who don't export. Avi Armoza left his role as svp at JCS, Israel's largest studio, to create Armoza Formats. The company has sold formats in Europe and North America. "Development is the most expensive and risky part of television. Many territories may not be able to afford U.S. and U.K. formats. Israeli shows can fill that need." Armoza's approach integrates content and technology. For example, *The Smart Ace* is an original poker trivia game show designed for niche channels and off-primetime in combination with the Web.

Hagai Levi never created his dramatic series *B'Tipul* to get rich. "You can live



Ananey's Udi Miron



Erez Tal, king of Israeli reality and game show formats

very well in Israel off of reality and game shows, but not drama. The producer who only produces drama will be in trouble," he said. After years of producing telenovelas, the creator and executive producer wanted to combine his interest in psychology with a cost-effective format. "Psychology is my hobby and my illness. I have been in therapy all of my life."

The format was sold to HBO in the U.S. and the series that is based upon it, *In Treatment*, is now in its second season, racking up Emmy and Golden Globe awards. Other versions are in production in France, Russia, Italy, Portugal and Serbia. "Except for Serbia, those countries have much higher budgets than Israel," said Levi. "If it wasn't for the overseas business, I would have lost money."

In Treatment is "Israeli" in the budgetary sense. "My intention was always to make it on the cheap...two actors, one location. For the telenovelas, I could write one episode every day. I truly believed that was possible for *In Treatment*. In fact, I needed an entire month to write each episode. So development took me one and a half years before shooting."

What remains to be seen is if scripted Israeli formats can maintain relevance abroad. "Some of the plotlines, such as the fighter pilot, are too Israeli. We all felt that the second season requires a much deeper adaptation to make it more culturally relevant," said Levi. Localization includes an entirely local writing team and new showrunner, Warren Light, who formerly served as showrunner for *Law & Order: Criminal Intent*.

Levi is not sure that other Israeli shows will have similar success abroad. "All of this is unbelievable. I showed up at a unique moment when the American networks were looking for ideas from abroad." For now, international buyers looking for cost-effective and creative formats are learning to say "shalom" to Israel. ●

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Ups And Downs

(Continued from Cover)

almost welcomed them. During the Great Depression, people continued to turn to the movies for escape. VHS rentals boomed during the recession of the early 1980s, while DVDs got a boost from the downturn earlier this decade."

Plus, during economic crises the entertainment industry has always come up with new ways to stimulate business. In the crisis of the early '80s cable TV came to the rescue. In the early '90s, home video was the savior. In 2001, it was DVDs. Now, it's digital media. Indeed, despite hard times, it seems that no one is cutting broadband service. Broadband is resilient, which is causing a surge of digital media revenues.

According to some analysts, in troubled economies, movie tickets and premium cable channels are the first to go among media options. But in the view of an HBO spokesperson quoted in *The New York Times*, "Pay-television has performed very well in previous

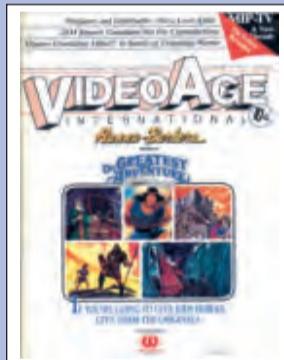
downturns." *The Orlando Sentinel* wrote that Florida cable provider "Bright House's On-Demand movies are up significantly as people try to save money by not going out to the movies."

Still, despite all that, don't count movies out just yet. During various crises the movie business hasn't stayed idle, either. At one time it responded with a widescreen format and now is facing an economic downturn square in the eye with 3D, or stereoscopic, technology. This year, a dozen or so 3D films are scheduled for release, with another 30 in various stages of gestation. By 2011, it is expected that 40 3D movies will be released in a single year. And, according to some reports, going stereoscopic adds only about 10 percent to a movie's production costs. It is said, however, that it is important to view stereoscopic movies as a way to bring more people to cinemas, not as a way to charge more than the already exorbitant ticket costs. If a ticket price increase for 3D movies is unavoidable, perhaps distributors should plan to exhibit the movies both in 2D and 3D and let moviegoers decide which they would rather pay for.

It has been pointed out that, whatever movies do, television does it better, therefore several TV set manufacturers, such as Phillips and Samsung, are already planning to introduce 3D TV sets. In the U.K., BSkyB is testing 3D TV. In Japan,

OTHER 1990 WORLD EVENTS IN THE TV INDUSTRY

- E! launched its 24-hour entertainment network in the U.S.
- The International Sports and Television Convention debuted in Monte Carlo (it was later renamed SPORTEL).
- Cable expanded throughout Europe.
- Studio output deals were all the rage with international broadcasters.
- International co-pros were the talk of TV markets.
- Video ratings meters were introduced in Puerto Rico.
- Though U.S. networks cut back on kids' TV, it was still big business for independent stations, cable and home video.
- *VideoAge* published its first Russian-language insert.
- Post-Communism, Mikhail Gorbachev called for independent TV stations and the end to single-party dominated broadcast monopolies.
- Plans were in place for the Soviet Union's first independent satellite television network.
- Soviets moved from all-barter deals to hard currency deals when buying international product.
- HBO launched Comedy Channel.
- Leo Kirch Group acquired more shares of German private TV network Sat 1, controlling a total 55 percent of the company's shares.
- NHK Japan Broadcasting Corp. established its own U.S. syndication and marketed programs to U.S. buyers.
- TV4 was the newest kid on the Swedish commercial TV block.
- Germany was reunited. East German TV facilities were expected to dissolve and become integrated.
- Distributors used MIPCOM and MIFED to talk to German buyers about changes in the territory.
- Sky Television merged with collapsed rival British Satellite Broadcasting to form British Sky Broadcasting (BSkyB).
- Rupert Murdoch's BSkyB bought rights to England's Premier Soccer League games, cutting into a pie held exclusively by ITV and the BBC.



OTHER 1981 WORLD EVENTS IN THE TV INDUSTRY

- *VideoAge* was born in New York City in September as "The Business Journal of Television."
- Universal Studios and Walt Disney Studios brought a lawsuit against Sony's Betamax over the issue of consumers recording broadcast transmissions; the act was found to be illegal.
- French president Francois Mitterrand proposed setting limits on U.S. programming in France.
- Overseas TV sales brought an estimated \$300 million to U.S. companies.
- Coca-Cola acquired Columbia Studios.
- Advertising expenditures on the three U.S. TV networks totaled \$5.5 billion.
- Despite economic difficulties, Brazilian TV revenues were expected to reach \$2.2 billion.
- The three U.S. TV networks claimed 85 percent of audiences.
- Banff had its second annual TV Festival after a one-year hiatus.
- In France there were only three TV networks (all public), while in West Germany there were just two TV networks (both public).
- Italy was the second largest TV market for the Americans, after Canada.
- In the U.S., 26 cable networks were in operation.
- Buyer registration at MIP-TV was 200.
- For the first time in five years, one-hour dramas outnumbered comedies.



satellite TV network BS11 of Nippon BS Broadcasting (part of NTV network) already transmits in 3D, and, in Europe, Phillips is working on a 52-inch auto-stereoscopic (glass-free) TV set. For the television industry it's a natural progression: First black-and-white TV, then color, then HD, and now 3D. And regardless of how new the concept might seem, 3D was actually invented in 1840.

Like with any crisis, the television industry has to adapt to audiences' newfound moods and tastes. One of the U.S. casualties of the current economic downturn seems to be the television drama, first because of the production costs involved and second because viewers like to laugh during troubled times. As such, dramedies will fare better, while comedies are poised to rise from the ashes.

And yet each new crisis brings new opportunities, at least for the film and television industries. *VideoAge*, for example, was born in New York City in 1981 in the midst of a recession in which the U.S. federal government raised interest rates to 18.87 percent for prime rate (interests charged to banks). Inflation was 10.35 percent, unemployment was 10.8 percent and the Dow Jones average (stock index of 30 large companies) went down 24 percent.

In 1981, inflation in Argentina reached 600 percent. Notes of one million pesos could barely buy a soda bottle. That same year, Poland declared martial law and, in 1982 Argentina went to war with Britain over the Malvinas (Falkland) islands while the Iranian oil crisis crippled Mexico.

At the same time, in the U.S., 134 movies were released, grossing close to \$2.35 billion, versus 133 movies the

previous year, which maintained the prior year's grosses. Total cable TV ad sales reached \$121 million, compared to just \$72 million the year before. For its part, NATPE 1982 stayed the course with small increases in both exhibitors (262) and attendees (5,551) from 1981.

We also tend to forget the 1973-75 U.S. oil crisis, when OPEC raised oil prices, causing oil and gasoline shortages and the price of a gallon of gas went up 233 percent in just one year.

But going back to the various crises as seen through the pages of *VideoAge*, the 1990-1991 recession caused 653 U.S. banks to fail, the Dow Jones was down 21 percent and prime interest rates reached eight percent. The world was in the midst of the Gulf War and Japan's Nikkei (stock market) Index went from 40,000 points to 13,000.

Psychologically, the biggest impact to the TV sector in 1991 was the Gulf War, which affected NATPE and the Monte Carlo TV Market the most. The eerie empty aisles are still impressed on the memories of the few NATPE participants who remained on the New Orleans convention floor. Similarly, few Americans ventured to the subsequent Monte Carlo TV Market, but everything bounced back as if nothing had happened in time for MIP-TV in Cannes in the spring.

Nonetheless, in the U.S. in 1990, 197 movies were released, up from 193 the previous year, while the box office increased by \$251 million to close to \$4.38 billion. In 1990, worldwide home video rentals and sales of U.S. programs increased to \$3.48 billion from the \$3.13 billion of 1989.

During the 2001-2003 recession,

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Ups And Downs

(Continued from Page 38)

exacerbated by the collapse of the tech stock bubble, the NASDAQ (electronic stock exchange) lost 3,935 points, or 78 percent, and the Dow Jones went down 38 percent. Then, nearly half of European bank lending in 1999 went to telecom companies. Moody's, a credit agency, estimated that about 80 percent of all the high-yield, or "junk" bonds issued in the U.S. at the height of the boom were to telecom operators. When the tech stock bubble exploded in 2001, the stock market value of all telecom operators and manufacturers had fallen

by \$3,800 billion from its peak of \$6,300 billion in March 2000. To put this into context, the combined loss in value on all of Asia's stock exchanges during the Asian financial crisis of the late 1990s was just \$813 billion.

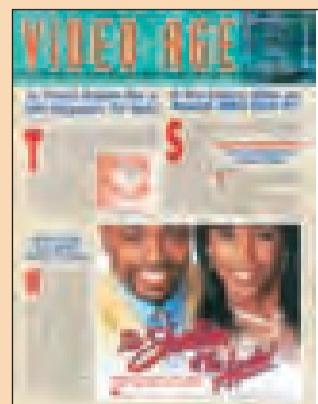
Japan's recession continued into the 2000s. Deflation began plaguing Japan starting in 1999, and by 2005 the yen had 103 percent of its 2000 buying power.

The European Union introduced a new currency on January 1, 1999. The euro, which saw its value plummet when launched as physical coins and bank notes in 2002, continued to be a weak currency, reducing its program buying power.

The 2001-2003 period also marked financial crises in Argentina, Brazil and Turkey. Meanwhile, in 2001, even though 477 movies were released in the U.S. — 25 fewer than during the previous year — box office grosses increased by \$612 million to \$8 billion.

OTHER 2001 WORLD EVENTS IN THE TV INDUSTRY

- DVRs became more commonplace, sparking fear in advertisers and nets.
- More advertisers than ever before attended NATPE. European companies became regulars.
- Monte Carlo market survived on format business.
- With the help of still-nascent DSL technology, program download services began to take shape.
- Vertical and horizontal integrations became mainstream.
- Repurposing shows became increasingly popular in the U.S. — both cable nets and network affiliates aired episodes soon after first-run.
- Reality TV took off worldwide.
- Tensions continued to mount between U.S. TV networks and their affiliates, the 35 percent ownership cap remained a bone of contention; nets were against it, affiliates were for it.
- U.S. talent unions argued over Internet copyright laws.



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The year 2002 witnessed the biggest fall in NATPE history, when participation dropped almost 50 percent, to 10,125 attendees and exhibitors by more than 36 percent to 553 companies, from the previous year.

In the current crisis, due to risky subprime loans (loans to non-credit-worthy borrowers), the Dow Jones is down 42 percent, inflation is at 3.6 percent, unemployment 6.7 percent, the prime interest rate is one percent and the Consumer Electronics Association reported a 0.1 percent increase of wholesale shipment revenues of consumer electronics in the fourth quarter of 2008, compared to the same period of 2007. According to U.K. research company IABM, profitability for the broadcast manufacturing and media technology sector worldwide "has still improved, but now it is only 9.3 percent." Analysis by London-based media buyer ZenithOptimedia showed that worldwide ad spending is expected to fall by 0.2 percent to \$490.5 billion in 2009.

In regions such as Latin America, Russia, China and India, Zenith expects advertising growth in 2009. Internet advertising is also expected to grow this year. In addition, the video game sector in the U.S. reported 2008 sales up 25 percent from the previous year.

Despite the worldwide economic downturn, attendance at last November's AFM in Santa Monica registered just a 5.3 percent decrease from the 2007 market's figures.

After a dramatic fourth quarter of 2008, the international television industry is now starting the new year with NATPE, full of the expectations that only new budgets can bring. At each subsequent market, companies will be able to better gauge the impact of their clients' cuts and the effects of their own cuts on sales. As with every financial crisis, strong companies will be strengthened and weak ones will get weaker, generating another round of mergers and acquisitions. To find out which are the strongest companies, one needs only to flip through the pages of any TV trade publication. ●



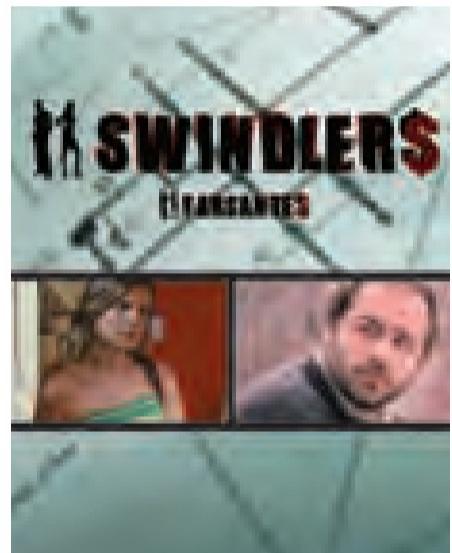
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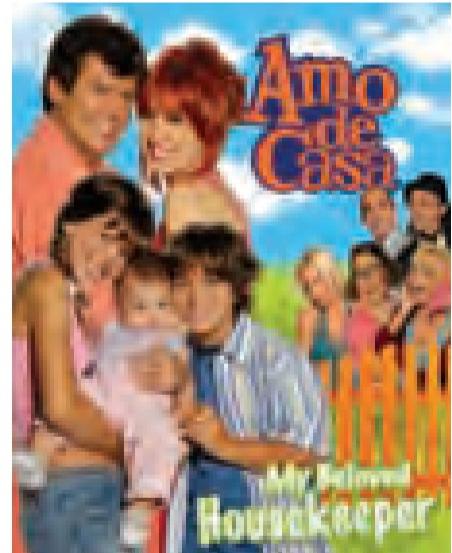
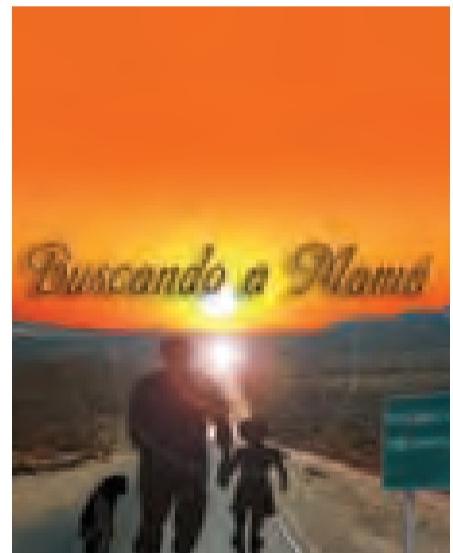
TEEN / CHILDREN

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TEEN TELENOVELA
FORMAT AND FINISHED PROGRAM



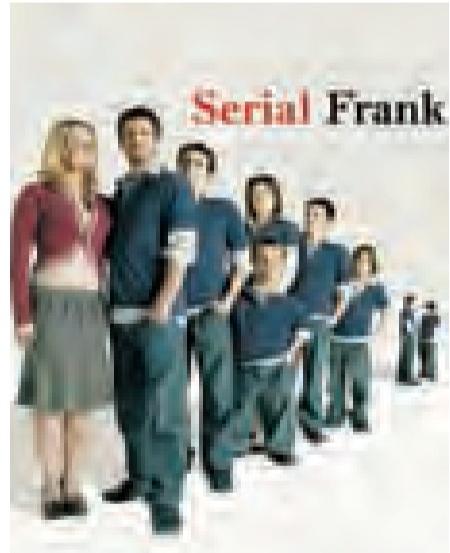
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Africa Prepares For Television

(Continued from Cover)

was the city's best residential area, and the vast, lavish home of the son of the country's former president.

Welcome to Africa.

The country in question is fairly well developed, has a moderately stable democracy with a convertible currency, and a fairly solid mixed business and industrial base. In short, it's not an African "basket case" or an out-of-control "banana republic." But the European businessman knew enough about the country, having already spent 250,000 euro researching it, that he needed influence — the right kind of influence — to have any hope of success there.

And that's particularly the case with media, and even more particularly the case with broadcast media, in just about every African country one can name.

Recently, *Video Age* reported in its April issue that Africa was TV's last frontier. The context was the launch of Africa's first TV market, DISCOP Africa, planned for February in Dakar, Senegal. As with any TV trade show, content providers will be selling to broadcast, cable and satellite TV station operators.

Just as when DISCOP East started, reaching Eastern and Central Europe not long after their Communist governments fell, there is a dearth of free-to-air stations in Africa. Central European Media Enterprises (CME) — a Bermuda-based company set up in 1994 to establish new commercial stations across Central and Eastern Europe after the end of Communism — solved that by launching new commercial stations across the former European Communist bloc.

Properly developing free-to-air stations is essential for the TV industry — especially in poorer countries. That's what will need to happen in Africa, just as it did in Central and Eastern Europe. But chances are the road will be longer, more difficult and more costly there, as the European businessman might soon find out.

Good quality TV entertainment arrived in Africa in 1995, with the launch of satellite broadcaster DStv across all of sub-Saharan Africa, but at a price. A decoder alone cost the equivalent of almost U.S.\$600. DStv exploited the lack of good quality broadcast entertainment across Africa, and expatriates, starved of the type of programs they grew up with in America and Europe, were forced to pay through the nose, together with well-heeled Africans. Having spent a year in Angola in 2000, I remember my monthly DStv subscription to be substantially more than what was paid to my housekeeper. But competition arrived in sub-Saharan

Africa in the form of Canal Overseas (owned by the French Canal+ group) in 2001, which rapidly expanded to 20 African countries by 2002. By 2004, DStv had dropped the price of its decoder to only \$68.

Pay-TV could become cheaper, said DISCOP Africa's Patrick Jucaud. "Cheaper pay-TV offers becoming available across Africa will radically change television consumption throughout sub-Saharan Africa in the near future, and will fuel competition between television operators. This competition will provide great opportunities for distributors offering the right content under affordable terms, especially in a part of the world where television advertisers still have money to spend!"

Even so, the proliferation of free-to-air stations will remain important for the growth of African TV, in order for program providers and advertisers to be able to tap the African consumer. That's not easy in some sparsely populated but vast African countries. In those places, capital city-only TV stations may be the way to go, both for viewership and distribution reasons.

A great many of Africa's 54 countries have only one TV station, owned by the government, whose daily purpose is to

it, particularly the perennially war-torn Eastern Congo, is of zero interest to a TV broadcaster. Even though, it is said that a city station could probably prosper in the bustling capital, Kinshasa.

What any TV businessperson hoping to make a buck in Africa should look for in a territory is probably a combination of healthy GDP and GDP per capita, a fairly stable democracy, a reasonably long period of peace, a mixed base of industry and business (which should include a healthy tourism presence as tourist money keeps governments on their toes), a narrow division between the top 10 percent of income earners and the bottom 10 percent, and a reasonable employment rate.

Unfortunately, in Africa, that list severely narrows down the field. In sub-Saharan Africa, right now those territories that qualify are probably much of West Africa (Nigeria and Ghana in particular), South Africa, and Kenya. City-based stations could find a home in Uganda, Tanzania, Rwanda and Burundi.

It's probably no surprise that virtually all these territories are English-speaking, with the exception of some French-speaking countries in West Africa.

South Africa is a special case. It had no television service until the 1970s, because

the public service broadcaster, BBC, is complemented by a strong private sector, headed by ITV. Similarly, in Kenya, you have the Kenya Broadcasting Corporation side by side with a strong commercial broadcaster, Kenya Television Network (KTN). KTN succeeded in breaking the public service monopoly only as recently as 1990.

Holding on to control of broadcasting is still dear to most African governments. Like South Africa, Kenya airs little imported programming, and the reason is probably cost as much as culture. Even the strongest African economies are weak compared to those in Europe and Asia, and the currency can seesaw (as the South African rand has) so program pricing will certainly be an issue at DISCOP Africa. Nigeria, the home of "Nollywood" — Nigeria's answer to Hollywood — is Africa's audiovisual powerhouse, but so far it has only four national TV stations, including the Nigerian TV Authority, backed up by some city channels.

As the continent's largest country with close to 150 million people, Nigeria will be top of the list for all content and format sellers at DISCOP Africa. But a useful word to know is "dash." In Nigeria, it means "bribe." You hear the word a lot in Lagos.

Even though South Africa, Nigeria and Kenya are the big beasts in the African TV jungle, there is evidence that the coming of DISCOP Africa will help boost other territories. In the end, it's programming — not presidential preening — that brings in viewers.

Some African TV stations are already writing their shopping lists. One of them is RTB, the state TV service in Burkina Faso, a West African country north of Ghana with around 15 million people. According to RTB's programming manager, Yoda Bourema: "24 Hour Chrono and Prison Break are both on my short list of top programs." He added: "Programs produced in Africa are also essential to me as most of them address local issues and social concerns of great importance to African viewers."

Bourema has competition in the form of two private channels. That could be one reason he is going to DISCOP Africa. Competition tends to energize people.

In the long run, competition will be good for Africa, and should be good for all international program export companies.

The new "African" U.S. president surely has a role to play in boosting Hollywood's sales to his Kenyan homeland and other African countries. Recently, the U.S. Ambassador to Kenya had speed bumps built on Muthaiga Road to slow down traffic on the busy thoroughfare that passes by his official residence. If America has the raw power to inflict such an alien concept on Africa's road warriors, getting them to buy *Buffy the Vampire Slayer* should be no contest. ●

David Short is an Africa-based journalist, and an associate consultant with Leriba Risk, an African political and business risk consultancy. He's currently in Nairobi, Kenya



Africa divided by its former colonial languages

extol the achievements of the president and his henchmen. Currently, and for the near future, only a few territories in Africa are ready to be exploited in any worthwhile commercial way.

Gross Domestic Product (GDP) is not a reliable guide to amenable territories. Angola is filthy rich with a GDP of \$65 billion, but that's predicated on its vast oil riches, most of which goes into the pockets of the ruling Dos Santos family and the associated families, called the "Futungo." The rest of the population lives a dirt-poor existence in a country destroyed by 25 years of civil war.

Nor do raw statistics such as geographical size or population help. The Democratic Republic of Congo is one-quarter the size of the United States with a population of 66 million. But most of

broadcast services were viewed with suspicion by the apartheid National Party government. However, its rich, developed economy boosted its TV industry in record time. South Africa's TV service is almost a facsimile of any found in Europe, with a mix of public broadcast channels from the South African Broadcasting Corporation (SABC), private free-to-air channels such as e.tv, and affordable cable and satellite services, such as M-NET.

South Africa imports U.S. and foreign programming, though it tends to produce its own domestic comedies and soaps (*Madam and Eve*, *Scoop Schoombie* and *7 de Laan*, for example).

Like South Africa, Kenya's television scene follows the British model of a public broadcasting service. In Britain,

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MPAA vs. IFTA

(Continued from Cover)

to create great movies for the future."

With Internet neutrality fast becoming a hot topic, *VideoAge* decided to explore its pros and cons by speaking to IFTA's Prewitt and the MPAA's Michael O'Leary, senior vp for Federal Affairs. Curiously, while IFTA was very forthcoming about its stance on Web regulation, the MPAA was at first reluctant to address the issue and, later, declined to answer some of *VideoAge*'s questions. In particular, O'Leary declined to go on the record with a definition of the term "net neutrality" as the MPAA sees it.

Ultimately, however, if readers come out confused by the whole exercise it is because, the two sides are basically in a semantic disagreement, since the MPAA and IFTA are both against regulating the Internet, but for different reasons.

Pros

VideoAge International: Could you define the term "net neutrality"?

Jean Prewitt: The issue is different for different players. But overall, what is meant by "net neutrality" is open, non-discriminatory access to the Internet. This means that broadband providers would be obligated to carry all the content out there regardless of source, not counting illegal materials. The issue first came up in a 2006 [U.S.] legislative battle that pitted the Googles and Yahoos against the telecom companies. The telecoms wanted to be able to pick and choose what



IFTA CEO Jean Prewitt

websites they allowed through. The issue has broadened since then.

VAI: Are there other definitions for net neutrality out there?

JP: Interest groups define it in different ways. For example, some people think net neutrality should mean no one can filter at all, and some people think it should mean no government involvement whatsoever.

VAI: Can you summarize IFTA's pro-neutrality stance?

JP: We believe that legal content should not be subject to discrimination and that consumers should be able to choose what services and devices they want to use. We also believe in transparency for consumers, meaning that if there is to be regulation from a broadband provider, consumers know about it beforehand and can choose to go elsewhere.

VAI: Who are the opponents of net neutrality?

JP: The Internet providers have been against it. They argue that without limited bandwidth they need to be able to manage

content. The MPAA is also against it because they think it will hinder their ability to search for and block piracy.

VAI: Without net neutrality (i.e., regulated Internet), who are the losers?

JP: The consumers, and their freedom to make choices. Also, certain websites that provide services that compete with broadband companies. For example, websites that stream movies and videos could be seen as competition to the providers [who also provide TV content] and blocked.

VAI: Does net neutrality have any down sides?

JP: Piracy is an issue. There is a great deal of technological knowledge that [the industry] doesn't possess. But whenever you move towards government regulation, you have to hope that the government regulates with a light touch. The fact is, the Internet has grown out from the creativity and enthusiasm of the public. When the time finally comes for regulation, it's going to take a collaboration between the private sector, who has the technological know-how, and the government, who has the power to provide leadership.

Cons

VAI: Can you summarize the MPAA's anti-neutrality stance?

Michael O'Leary: Our stance is pretty simple. There's been a debate about whether the government should regulate the Internet for a while now. We have been looking at the issue for a few years. We're opposed to overly broad government regulation, which is what net neutrality would be. We're not advocating for regulation, contrary to what people believe. At this point any type of overly broad regulation, such as instituting a rule like net neutrality,

would be premature. What is coming down to is providers need to be allowed to manage content in order to deal with piracy, which net neutrality would prevent.

VAI: Who are the other opponents of net neutrality?

MO: The studios, meaning the six major studios that we represent, who want to protect their content. Also the service providers, although they are coming at it from a different perspective.

VAI: Who are the opponents of your anti-neutrality stance?

MO: When there's an issue floating around in Washington D.C. for a while a number of coalitions appear. A lot of people support the concept of net neutrality, but in practice, it's not altogether clear what they envision as an ideal system.

VAI: If net neutrality is instituted, who are the losers?

MO: What it really comes down to is that we as an industry have made major strides at making TV and movies available on the Internet over the past couple of years through Hulu [a TV streaming service] and a number of other things. So the entire industry loses out as a result of blanket regulations. But at the same time, we have to worry about theft and piracy. We have to worry about content being misappropriated. We can't have Congress step in and blunt our ability to grow, because it will hurt the consumers.

VAI: Do you see a compromise between the two points of view any time in the future?

MO: I honestly don't know. There will be a lot of discussion in the next few years. When policy makers sit down to discuss this issue and to seriously discuss the future of consumer choice on the Internet, we can only hope that we'll be able to voice our practical concerns. Up until now we have not been able to. **ES** ●

NET NEUTRALITY AROUND THE WORLD

The Internet is certainly not neutral, considering that everyone has an opinion about it. But the subject of so-called "net neutrality" is not only being contested but is also a "hot" topic around the globe. The reasons are varied: Some are concerned about the loss of business (e.g., piracy), others about privacy and security (e.g., phishing). Many people view the Internet as the last bastion of free expression and therefore should remain unregulated, but there are also those who say that certain things, like Internet hate speech for example, must be regulated.

For some people, net neutrality (formerly known as the end-to-end principle) means that the people who provide connections to the Internet don't get to favor some bits over others. For others, net neutrality means regulations (regulating its neutrality), therefore they oppose any form of regulation, which, in their view, could stifle innovation. Some argue that the Internet is never neutral, since it would always favor one sector or another (now it favors the consumers).

One of the biggest complaints about net neutrality is the abuse that some cable and telco subscribers make with large bandwidths. For example, last November, the CRTC, Canada's telecommunications regulatory agency, allowed reduced speeds (known as throttling) for certain applications (such as peer-to-peer), thus favoring large Internet service providers (ISPs) such as Bell Canada, over smaller, independent ISPs.

Large bandwidth providers see the abuses especially with uploading, which, in effect, could turn each cable or telco digital subscriber into an ISP, while large content providers decry the speed with which pirated movies can be shared.

A coalition of European and U.S.-based consumer organizations, the Trans-Atlantic Consumer Dialogue (TACD), has called for each of their respective governments to adopt net neutrality-oriented telecommunications policies. TACD represents 65 groups in Europe and the U.S.

The first major Parliamentary debate on net neutrality in the U.K. was held in March 2006. The conclusion was that net neutrality laws in the U.K. would be "extreme... unattractive and impractical" and that it was "an answer to problems we don't have, using a philosophy we don't share." In other parts of the world, like Japan for example, the nation's largest phone company, Nippon Telegraph & Telephone, operates a service called Flet's Square that serves video-on-demand at speeds and levels of service higher than generic Internet traffic. Conversely, in South Korea, VoIP is blocked on high-speed FTTH (fiber-to-the-home) networks except where the network operator is the service provider.

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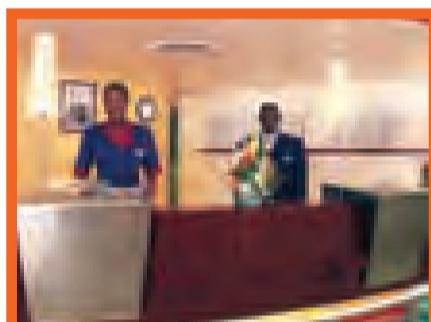
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Conferences & Events News

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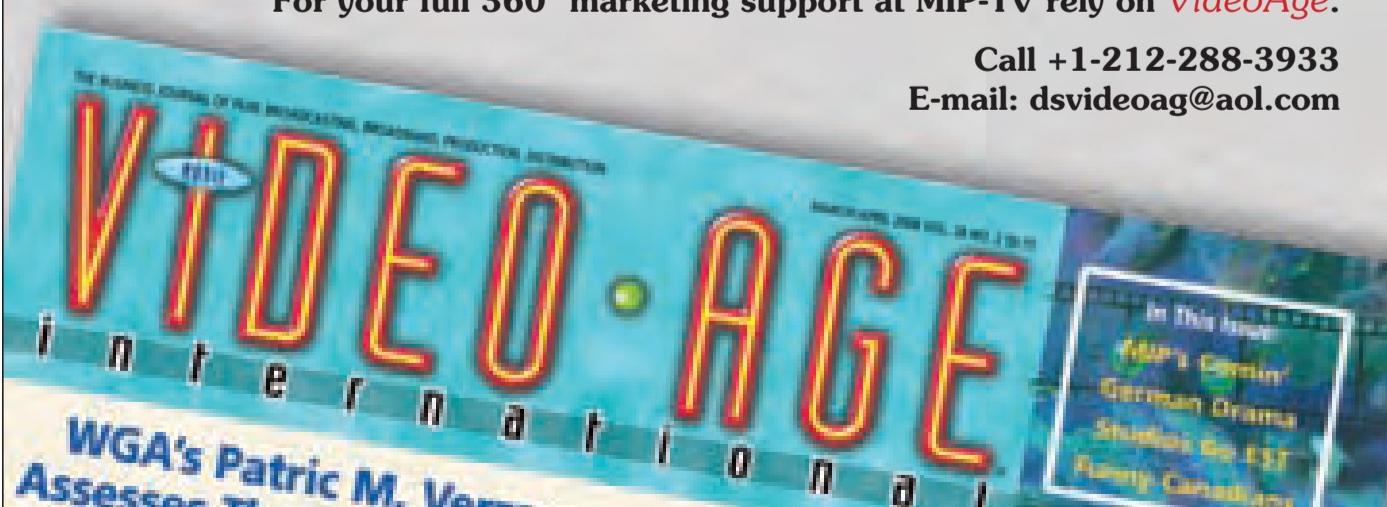
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So broadcasters are now "really" complaining that big movies no longer work on free-to-air television. To that I ask: "What are broadcasters doing to change that?" After all, they control the audience, not the movie producers and/or distributors! Well, the answer to that question is pretty grim: Basically, broadcasters are not doing anything. Actually, they're doing something: not buying movies. How times have changed. Today, in addition to the financial crisis, it looks like we have a creativity crisis in our hands. Years ago, nothing stopped broadcasters, not even a bad show.

I remember the challenge that a local U.S. TV station faced when a syndicated rerun of an off-net show would not take off with a female audience. Now, you understand that each episode of an off-net show has been milked by a network at least twice if not three times, add to that a syndicated run, and you'll get the picture!

In that case, the local broadcaster tried the usual trick of moving the show around various time slots, to no avail.

Finally, someone in the TV station's promotions department started thinking outside the box, theorizing that the problem wasn't the time slot, nor could it be attributed to the "also-ran" syndrome or to the show itself. The main issue, in the mind of this creative person, was the perception that the female audience had of that series. So, the promo executive first fidgeted with the on-air promos by editing sexy takes of the syndicated shows' key protagonists and then showing them during afternoon programs popular with female viewers. In no time the demographics began improving to the point of becoming a station hit.

Now let's go back to the movies. Some broadcasters buy all rights on A-titles because dubbing is too expensive and thus it doesn't pay to invest that kind of money on B-movies. Then, in order to recoup their money, buyers have to exploit movies through the maximum number of windows. This means that, by the time an A-title arrives at a free-to-air network even the homeless have most likely seen it.

So what's a broadcaster to do? Let's us too think outside the box and come up with something unusual or, if possible, add something extra to the broadcast. Naturally, the first thing that comes to mind is a media blitz, planning interviews with movie stars before and during the airing. This, however, could be expensive and, as I like to say, "If one cannot afford the solution, then it's not a solution." In lieu of this expensive proposition one could utilize something from the film that has not been fully exploited, like, for example, its outtakes.

This latest solution began to take form in my mind during a stimulating chat during early November's Santa Monica-based AFM at CCI's suite with that company's Jill Keenleyside and *Alice Upside Down*'s producer Seth Willenson. Both seemed puzzled and intrigued by the idea and encouraged me to keep blabbing, while alternating nonsense with enough sensical things that could, ultimately, produce something really interesting.

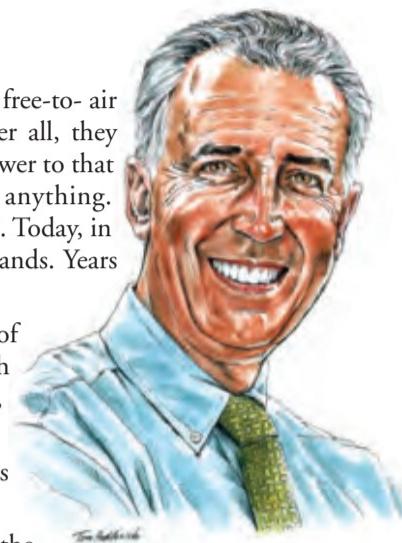
Then, later that month, *The New York Times Magazine* reported that DVDs are getting a new lease on life through the showing of outtakes and production techniques. In the same interview, Hollywood director Rob Cohen stated that background info on DVDs "completes the film experience."

Imagine, in broadcast's case, outtakes could become a preview which will encourage even people who have seen the movies in theaters, on pay services, subscription services and even on DVD, to tune in.

By fine-tuning the idea, it seems logical that these outtakes should be programmed the day before the actual movie is shown, with the intent of generating more interest and curiosity, especially to review scenes that one did not pay particular attention to during the film's previous showings.

Here the name of the game for a broadcaster is to increase people's curiosity. It is also worth noting that there is a difference in the way people watch movies in the theaters and at home on the TV screen. Broadcasters should capitalize on that difference. Plus, producers and distributors should help broadcasters in gathering all possible materials to make the film being seen to be viewed in a new light.

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